

# Comfort Times

by ISPF

## STANDARDIZATION

### Is the Indian mattress industry working on it?

**17** Automation in Mattress production

**39** Marketing and branding measures by mattress brands in the digital age





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# STANDARDIZATION Is the Indian mattress industry working on it?

Standardization of mattresses is one of the biggest concerns for the Indian mattress industry as it creates confusion among consumers and suppliers. Suppliers try to meet consumers' demand by taking up customized order but it affects the overall supply chain operations of the mattress manufacturers.

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# FROM THE EDITOR



It has been observed that anything in growth mode is always chaotic. Be it a business or any budding industry, the growth phase is often challenging with many uncertainties caused due to lack of well-defined rules. The Indian mattress industry is facing the same situation. The industry is growing and getting into an organized path, new brands are coming up with fresh ideas, established market players are innovating further. While digital native brands are focusing on the 'brick and mortar' model, the reputed market players are on their digital transformation journey to offer seamless online shopping experience to their consumers.

If we just talk about the recent developments in the past, one can say, things are going well but if we look at the ground level, these developments would look very superficial. It goes without saying that majority of consumers prefer buying mattresses offline. But we need to understand, 'why' don't they prefer shopping online. In a casual interaction with some consumers based across various cities in the country gave us an impression that consumers are willing to buy mattresses online, especially, when they are guaranteed with 100-days trial and easy return policy. However, the hassled experience of buying mattresses online refrains them from shopping online.

However, the good part is majority of consumers are happy with the mattresses that they purchased and they also had a

good experience while shopping mattresses from exclusive outlets or multi brand outlets.

There are other areas of concern pertaining to the domestic mattress industry that needs to be addressed with a serious approach. Automation in mattress production, management of logistics and standardization of mattresses are some of the other issues concerning the industry. Automation has been embraced by most of the Indian mattress manufacturers, however, the approach is yet to be holistic. In this issue, we have analyzed an ideal method that should be adopted by Indian mattress manufacturers. As far as, logistics in mattress industry is concerned, technology has made logistics better, however, the role of technology is yet to be utilized to its full potential.

If we focus on standardization in the Indian mattress industry, the inconsistencies in the sizes of cots and mattresses are not only creating confusion among consumers but it also poses a big challenge for the supply chain management. Indian Sleep Products Federation (ISPF) is working with various mattress manufacturers to decide on standard sizes for mattresses, suiting consumers and mattress companies. We have focussed on the core issues concerning the industry and it is time for us to adopt a holistic and systematic approach to tackle the existing issues, giving scope for the industry to get more organized and compete with its global peers. It's time for us to address these challenges.

**S. SUNDARESAN**



**ISPF**

# INDIAN SLEEP PRODUCTS FEDERATION

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Sheela Foam Limited



Centuary Fibre Plates Pvt. Limited



Kurlon Enterprise Limited



Tirupati Foam Limited



Duroflex Pvt. Limited



Godrej & Boyce Mfg. Co. Ltd.



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The Sleep Company





# SERVICE

## ISPF **VISION**

- ▶ To promote the sleep products industry by enhancing consumer awareness on quality sleep, while setting benchmarks for its products and services.
- ▶ To represent the industry with a commitment to the society and the environment.

## Duroflex, Inspire Institute of Sport collaborate to provide free mattresses to athletes

Duroflex has collaborated with Inspire Institute of Sport (IIS) to help athletes optimize their performance by providing training institutes with free mattresses. The mattress company also launched a new 'Energise' product, which is sustainable and made up of a unique copper gel infusion layer and anti-stress fabric to help individuals get the right kind of sleep. It is supplied free of cost to athletes in Inspire Institute of Sport (IIS). The anti-stress fabric is made up of recycled yarn made from PET bottles, and packaging of the mattresses is also fully recyclable.

"This collaboration with IIS is a

testament to our belief that quality sleep is the cornerstone of peak performance. Our mission is to help athletes understand the significance of rest in their journey," a report on the New Indian Express quoted Mohanraj J, CEO, Duroflex, as saying.

This year in May, the mattress brand announced cricket icon Virat Kohli as its new brand ambassador to further their mission of advocating the significance of quality sleep towards ensuring a long healthy life. Alongside, this announcement, the company also launched its firmness-adjustable mattress named 'Neuma'.

## Sleepwell announces the launch of Pro Nexa® Mattress

Sleepwell has introduced its latest Pro Nexa® Mattress that features 'enhanced body recovery' proprietary technology, the first of its kind in India. According to India's leading mattress maker, it offers superior comfort as compared to ordinary memory foam.

The Pro Nexa® Mattress is launched through a nationwide ad campaign featuring the culinary expert and renowned TV personality, Kunal Vijaykar. The campaign showcases the key difference between Sleepwell Pro Nexa® mattress and memory foam mattress by using the creative analogy of dough versus bread. Earlier this month, Sleepwell kicked off the 'Did You Sleepwell' campaign to nudge people into caring about the comfort of others. Now, it is bolstering the same with this product-centric campaign for the launch of Pro Nexa® Mattress.

Speaking about the campaign, Nilesh Mazumdar, Chief Executive Officer at Sheela Foam Pvt. Ltd. said, "*Sleepwell has always been at the forefront of foam and sleep technology. With the launch*



*of our latest Pro Nexa® mattress, with 'enhanced body recovery' technology, we're not just redefining comfort; we're delivering on a promise of unparalleled sleep quality. Our relentless pursuit of innovation not only delivers most comfortable sleep but also drives business growth and further solidifies our position as the leader in the sleep industry."*

Launched in 1994, Sleepwell is a leading mattress & bedding accessories brand with a nationwide presence and a robust distribution network of exclusive retail outlets, multi-brand outlets and distributors. The brand always stays up to date on consumer behaviour - right from how they live, to how they sleep and is constantly innovating, with its technological capabilities, to keep up with their evolving needs.

## Century Mattress plans launch of experience centers in South India

Century Mattress plans to strengthen its presence in the South India with the opening of around 15 experience centers in Chennai, Bengaluru and Hyderabad. It recently launched its first-ever experience center at Chennai and plans to establish five centers in these three cities in the next six months.

"We are piloting the experience center models in the Southern markets, which have higher penetration of organised players than the national average, and eventually scale into Central, Eastern parts among other places," a New Indian Express report quoted Uttam Malani, Executive Director of Century Mattress, as saying.

The company intends to increase its presence to 100 exclusive experience stores by 2025. The company currently has 5,000 retail outlets and 500 exclusive brand outlets mostly established across Tamil Nadu and Telengana.

According to Malani, Century Mattress holds roughly 10 percent market share in the Rs. 4,000 crore organised mattress market in the country. The mattress brand has recorded a 30 percent yearly growth on average and hopes to continue growing at the same rate over the next three years.

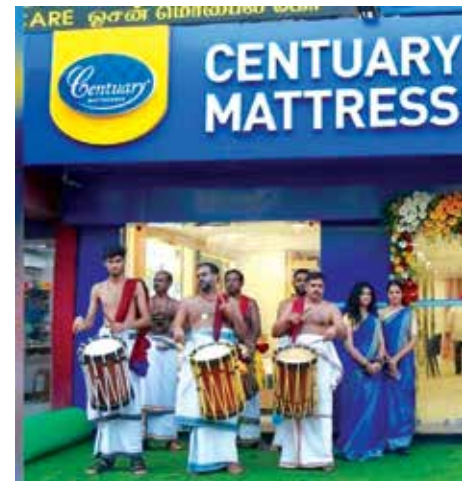


Image courtesy: The new Indian Express



## Global Smart Mattress Market to Reach \$254 Million by 2030: Reports

The global market for Smart Mattress estimated at US\$ 121.2 Million in the year 2022, is projected to reach a revised size of US\$ 254 Million by 2030, growing at a CAGR of 9.7 percent over the analysis period 2022-2030, according to report by Research and Markets.

Offline, one of the segments analyzed in the report, is projected to record 9.4 percent CAGR and reach US\$ 211.5 million by the end of the analysis period. Taking into account the ongoing post pandemic recovery, growth in the Online segment is readjusted to a revised 11.3 percent CAGR for the next 8-year period.

The Smart Mattress market in the U.S. is estimated at US\$ 36.9 million in the year 2022. China, the world's second largest economy, is forecast to reach a projected market size of US\$ 43.5 million by the year 2030 trailing a CAGR of 9.2 percent over the analysis period 2022 to 2030.

Among the other noteworthy geographic markets are Japan and Canada, each forecast to grow at 8.9 percent and 8 percent respectively over the 2022-2030 period. Within Europe, Germany is forecast to grow at approximately 7.9 percent CAGR.



## King Koil announces the launch its first showroom at Al Khobar in Saudi Arabia

After its successful launch in Riyadh and Jeddah, King Koil has announced the opening of its first showroom at Al Khobar in Saudi Arabia. With this showroom, King Koil aims to bring an exceptional sleep experience to the heart of Al Khobar.

The showroom will showcase the latest collection of King Koil mattresses and beds, including the King Koil Intimate Collection mattresses, 'Embrace' and 'Affinity'. The Intimate Collection features innovative technologies, including the Smart Cushion Aero System (SCAS) for enhanced air flow and cushioning, iFusion for temperature regulation, and Mega Foam for eco-friendliness and comfort.



*Image courtesy: <https://mid-east.info/>*

## IBIA EXPO 2023 held at Istanbul from Sept. 28 to Oct. 1

Turkey is emerging as a key player in the mattress production sector with a potential value of US\$ 40 billion and providing employment for approximately 25,000 people. The Turkish mattress industry ranks 14th in global production and export rankings, according to a Furniture world report.

In the bed sub-industry sector of Turkey, it is projected that by the end of 2023, production will reach US\$ 4 billion and exports will reach US\$3 billion. The IBIA EXPO, organized by BİFAŞ in collaboration with IBIA (International Mattress Industry Association), aims to boost exports and trade volume. The expo was conducted from September 28 to October 1, 2023, at the Istanbul Expo Center and was visited by industry professionals and thousands of

visitors.

The expo showcased a wide range of products and technologies related to mattress production, including production lines, fabrics, materials, and machinery. IBIA EXPO 2023, organized by BİFAŞ, is swiftly gaining international recognition as the sole trade fair of its kind. Manufacturers from Turkey and around the world attend to enhance production efficiency and trade. Professionals, including high-level executives and company owners had attended the expo to make business deals and explore new products and technologies. This international fair had showcased the latest technologies and serving as an export platform. It facilitated meetings between buyers and brands, particularly from 14 target countries.

# STANDARDIZATION

## Is the Indian mattress industry working on it?

Standardization of mattresses is one of the biggest concerns for the Indian mattress industry as it creates confusion among consumers and suppliers. Suppliers try to meet consumers' demand by taking up customized order but it affects the overall supply chain operations of the mattress manufacturer.



**A** 38-year-old Anamika\* Acharya, an investment banker by profession, moved from Bangalore to Hyderabad just before the pandemic, to join her husband who had relocated to Hyderabad for his employers' requirements. The couple had always lived in furnished apartments but preferred having their own mattress. After moving to Hyderabad, she had no other option but to dispose her relatively new mattress, which she had bought in Bangalore. Did she have a problem with the mattress? She says, *"I had to look for another mattress that would fit one of our beds. The dimension of the previous mattress was smaller and did not fit the bed well."* Fortunately, the other mattress that she had, fitted well in one of the bedrooms of her new home.

If we just give it a thought, had all the beds across the residential establishments in the country and the mattress sizes would have been built and designed cohesively in a uniform fashion, many consumers like Anamika\* would have not faced this issue of their mattresses not fitting the new beds. Additionally, this would reduce the chances of mattress disposal, which is another big concern.

There are several other issues concerning the Indian mattress industry, however, the biggest concern facing the organized players in the Indian mattress market is the need for standardization of mattress in terms of sizes, quality, features and benefits.

In the absence of industry wide standards and regulations, it is difficult for consumers to compare mattresses and it also poses a big challenge for manufacturers with supply chain issues and delays in product delivery. Is the mattress industry thinking seriously about standardized bed sizes? Are there clearly laid rules regarding flammability, testing, labelling and sustainability? The Indian mattress industry is slowly getting into the organised path, however, it still has an uphill task to work on areas of standardization that would assure consumers about the quality of mattresses.

### **Areas where standardization is needed**

Standardization is not only limited to dimensions and sizing. There are many criteria that must be set by industry bodies and should be made mandatory for mattress manufacturers to adhere to the standard rules and regulations. Standardization will contribute towards ensuring better quality, safety and performance of mattresses.

The areas where standardization could help consumers make the right choice include mattress sizes and dimensions, materials and components used during production, fire safety standards, health and safety standards, performance requirements, labelling and certifications and sustainability.

The most common mattress dimensions available in the Indian market include Single/Twin Size (75 inches × 36 inches), Double/Full Size (75 inches × 54 inches), Queen Size

## **The biggest concern facing the organized players in the Indian mattress market is the need for standardization of mattress in terms of sizes, quality, features and benefits.**

(78 inches × 60 inches), King Size (78 inches × 72 inches), California King Size (84 inches × 72 inches). However, these dimensions may vary slightly across different mattress brands and models, making it difficult for consumers to spot the right size of mattresses for their beds.

*"It is usually seen that people don't want to change the cot, they only change the mattress. We can't change the mindset of people overnight. So the industry has now gathered to cater to the needs of the customer suiting their taste and requirements. There has been large number of non-standard items, so we have made certain sizes as standards and that has been accepted by all brands. Brands have also come out with strict standards so that in future all the customers will be tuned to have these standard sizes only,"* says S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF).

Deciding on standard sizes of mattresses and cots is required to ensure less confusion among consumers and mattress suppliers. In western countries, mattresses, have limited number of mattress sizes, giving less scope for confusion among consumers and mattress makers.



While mattress companies are investing various resources towards making their mattresses more user friendly, it is the differing cot measurements that mostly makes it difficult for consumers to pick the right mattress for themselves. As far as mattress companies are concerned, addressing to individual customers' requirements entails great deal of time, effort and non-value added costs. *"Standardization for mattress depends on the standardization of cots. In western countries, maximum 5 or 6 standard sizes of mattresses are available. More than that, you don't have any other options, whereas the problem in India is basically because of cots, and it is also because of the bedroom sizes which the builder builds. So, we have numerous of sizes which creates confusion for all the mattress suppliers. So, if we are able to stick on to the same standard sizes which other countries follow, then the matter will be very easy for everybody and it will not be a problem at all. So, the crux of the problem comes from cot and not from the mattress,"* says Ravi Prasad, Chief Product Officer, Kurlon Enterprise Limited.

\* Name changed to ensure privacy for the individual.



## Standardization is not only limited to dimensions and sizing.

Currently, the Indian mattress market has too many inconsistencies, leading to confusion among consumers. There are various brands but there is limited understanding about them among the customers. There are various brands offering different types of mattresses with different features and benefits but it often gets overwhelming for customers who are not well aware of the different types of mattresses and what suits them the best.

Additionally, inconsistent market standards and lack of clear information makes it very difficult for customers to make a firm buying decision.

### ***Current status of standardization in mattress industry***

As pointed out by a Technopak Analysis report, one of the key challenges facing the Indian modern mattress industry is the 'non-standardization of bed sizes'. In India, there is lack of standardisation in bed sizes, which poses a key challenge for mattress manufacturers. The standardized mattresses do not fit the bed, which are customized as per consumer requirements. This has shifted the industry towards manufacturing customized mattresses in recent years, as mentioned in the report.

However, customization of mattresses is not a feasible option for mattress companies as it affects the overall efficiency of the company's supply chain operations. Meanwhile, there are instances, wherein, the suppliers has taken up a customized order and while the mattress is undergoing the production process, the customer has cancelled the order.

In such instances, customized mattresses cannot be sold to some other customer. If the mattress is of a standard size, it has a scope of getting sold to next prospective buyer. This ensures the continuous movement of stocks from the manufacturing units.

*"The supply definitely gets affected to a larger extent because sometimes with non standard sizes, the customer sometimes waits for about 15 to 20 days and in some cases customers want the mattress to be delivered in a short time. So, lot of arrangements needs to be done in terms of, fabricating these odd sizes from a standard size, locally. Or to be supplied from the factory, it takes bigger lead time, which is a nightmare for the supply chain management because if there is a delay, and if it gets cancelled, you are again going to get non-moving stocks*

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## The dimensions vary slightly across different mattress brands and models, making it difficult for consumers to spot the right size of mattresses for their beds.

*accumulating within the company. But for a standard size, one customer doesn't take the mattress, you are ready to supply it to anybody else. So, this is another big challenge for the supply chain management when the odd sizes are not being delivered or not being given to the customer doorstep on time,"* explains Ravi Prasad of Kurlon Enterprise Limited.



In the recent years, the Indian mattress industry has seen some degree of standardization and have figured out areas for improvement that would ensure better quality control and standardized production processes to meet consumers demands. Himanshu Mehta, Managing Director at Himrag Coir Products Private Limited explains, *"As far as dimension and size is concerned, almost every organized player is following the standardized format. But is very difficult to standardize the product configuration. Every company has a separate set of offering but that is there in any product group, not necessary in mattress segment. Configurations can't be standardized but in terms of sizes, most organized players have moved to a standardized size."*

ISPF has been working closely with all registered

mattress companies in India to ensure that the industry embraces standardization of mattresses. The aim is to discourage the sale of non-standard mattresses through various implicit measures that will deter consumers from buying non standard sizes.

### ***How can standardization help the industry grow***

The Indian mattress industry is still dominated by the unorganised sector. It is the right time for the growing organized sector to collaborate and work on establishing standardized measures that will help the industry grow. Standardization can help the industry grow in terms of quality assurance, interoperability, consumer protection, market expansion, Research and Development (R&D), sustainability.



*"Standardization in the Indian mattress industry is still a challenge as our furniture industry that is 'beds' are still very unorganised and fragmented. This is quite varied by states with the western states having custom made sizes as high as 90 percent as against around 50 percent in other states. This requires building customisation capabilities across our delivery points as at the end of the day it is the customers'*

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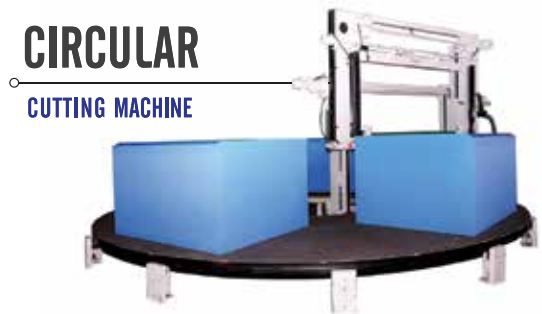
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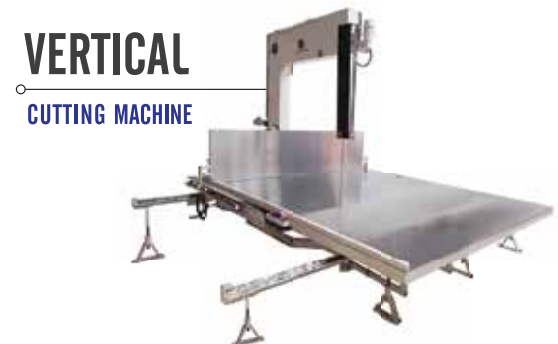
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**In western countries, mattresses, have limited number of mattress sizes, giving less scope for confusion among consumers and mattress makers. Customization of mattresses is not a feasible option for mattress companies as it affects the overall efficiency of the company's supply chain operations.**

*requirements and the industry has the responsibility towards this expectation,"* says Manoj Sharma, President - Retail Sales, Sheela Foam Limited.

Standardization can help the mattress industry overcome some of the key challenges and tap growth. The Indian mattress industry continues to be in the grip of unorganized market players. Standardization of mattress in various areas like, sizes, raw materials, firmness could help the organised sector become more distinguished against their unorganised peers. It will help mattress suppliers manage their supply chain better and cut excess costs. Additionally, it will help them deliver products to the consumer faster and ensure efficiency in the overall supply chain operations.

Mattress industry bodies like ISPF have been working closely with various mattress brands to establish certain standards in the Indian mattress industry. Almost every established brand is working cohesively in this direction and in the years to come, we could see brands complying with various standards. **CT**

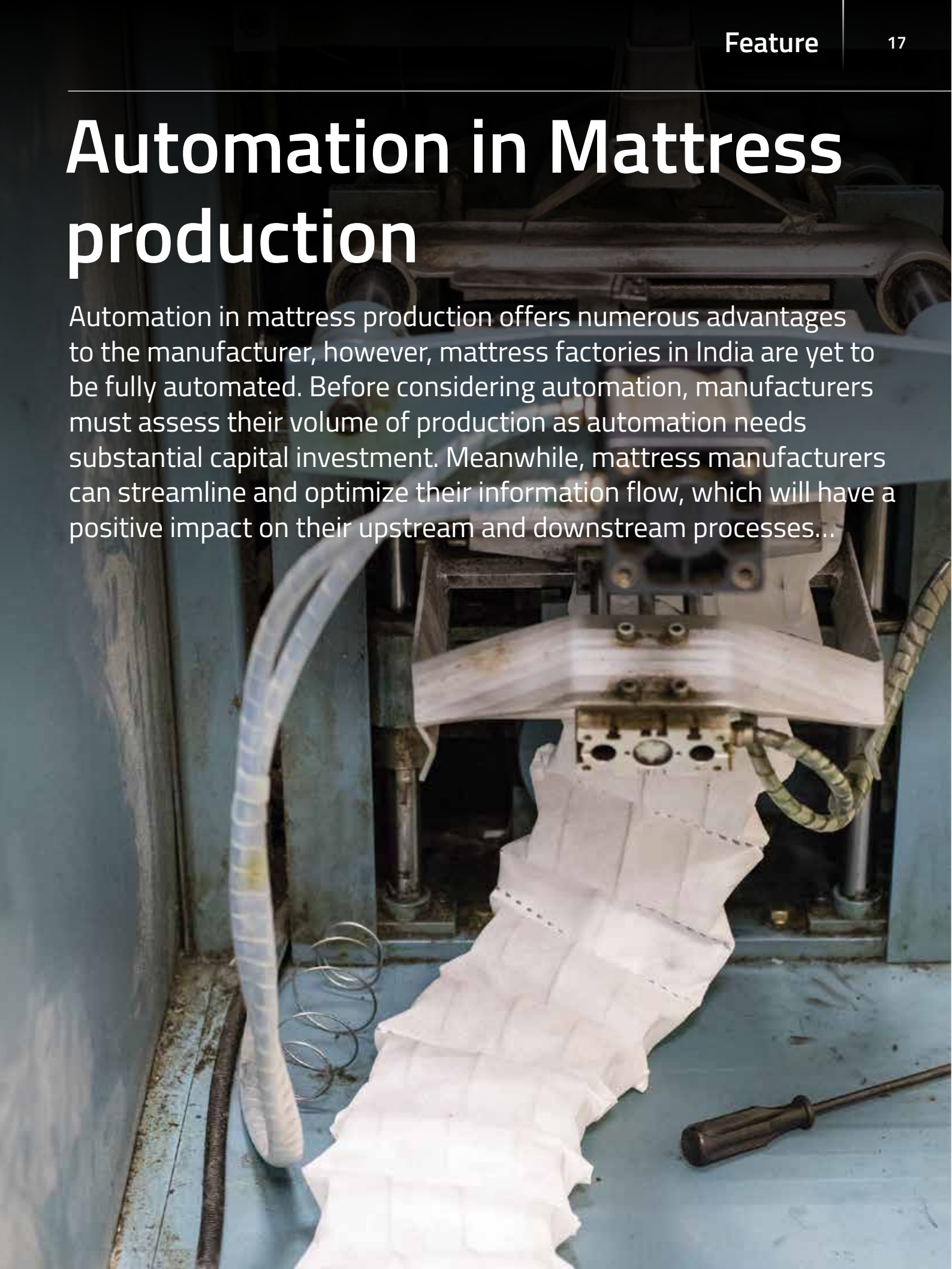
### KEY TAKE-AWAYS

- In the absence of industry wide standards and regulations, it is difficult for consumers to compare mattresses and it also poses a big challenge for manufacturers with supply chain issues and delays in product delivery.
- The areas where standardization could help consumers make the right choice include mattress sizes and dimensions, materials and components used during production, fire safety standards, health and safety standards, performance requirements, labelling and certifications and sustainability.
- While mattress companies are investing various resources towards making their mattresses more user friendly, it is the differing cot measurements that mostly makes it difficult for consumers to pick the right mattress for themselves.
- In the recent years, the Indian mattress industry has seen some degree of standardization and have figured out areas for improvement that would ensure better quality control and standardized production processes to meet consumers demands.
- ISPF has been working closely with all registered mattress companies in India to ensure that the industry embraces standardization of mattresses and discourage the sale of non-standard mattresses through various implicit measures that will deter consumers from buying non-standard sizes.



# Automation in Mattress production

Automation in mattress production offers numerous advantages to the manufacturer, however, mattress factories in India are yet to be fully automated. Before considering automation, manufacturers must assess their volume of production as automation needs substantial capital investment. Meanwhile, mattress manufacturers can streamline and optimize their information flow, which will have a positive impact on their upstream and downstream processes...



The Indian mattress industry is on its growth trajectory with the organized segment recording steady growth. In our last issue, we had analyzed how the organized segment is stealing its share from its unorganized peers. Meanwhile, consumers are showing more inclination towards good quality sleep products due to increased understanding about the benefits of good sleep towards ensuring overall wellbeing, higher disposable income and need for better standard of living. The mattress industry in India is growing and with the ingress of new players in the market with their new ideas, the sleep industry is growing bigger. The introduction of D2C model has increased the accessibility of good quality sleep products at a reasonable price. Coupled with that, the easy buying and return policies and 100-days trial initiatives by various mattress companies has lured many consumers towards good quality mattresses and sleep products from organized players of the mattress industry.

Now, with the growing demand of good quality mattresses, manufacturers have to roll up their sleeves to meet the growing requirement of consumers. For this reason, increased adoption of an automated environment in the mattress manufacturing firms is now more important than before. Automation is not a new concept in the manufacturing industry. It helps manufacturing concerns get production processes faster, better and more efficient by eliminating the risk of human errors. Growing number of mattress manufacturers in India have invested good amount of resources in automated machines, so that they can use their skilled labors towards more constructive activities like ensuring better quality checks and strict adherence towards sustainable measures. *"Most of the mattress factories earlier were manually operated. Now, automation is more of a necessity as it helps improving efficiency, productivity, reduces chances of errors and most importantly, it is economic,"* says S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF).

Additionally, a well automated mattress manufacturing facility will help reduce production waste and ensure safety of factory workers. Mattress manufacturing happens in multiple phases, right from raw material procurement to final packaging. *"In the traditional mattresses, around 30 to 40 percent of the portion has been automated in terms of pasting and lamination of the mattresses. So, the finish of the mattresses was always automatic since beginning but still there is some manual component involved in the traditional mattresses which I do not think will go very early,"* says Himanshu Mehta, Managing Director at Himrag Coir Products Private Limited.

Though mattress manufacturing business looks positive but there are many concerns that the manufacturers must consider while increasing the adoption of automation in their manufacturing facilities. This article will explore further on the need for automation, the ideal processes for implementing an automated environment in mattress factories and the biggest challenge facing manufacturers while considering automation.

## Increased adoption of an automated environment in the mattress manufacturing firms is now more important than before.

### Need for automation

Automation is important in mattress manufacturing as it ensures operational efficiency, optimum time savings, flexibility and scalability and better return on investment (ROI). It is now a valuable consideration due to factors like unavailability of skilled labors, changing and competitive business models and shrinking profit margins. Investing in automation in mattress manufacturing will make the industry more productive and profitable. Automation can help the mattress manufacturers in terms of

- Saving Time and Money
- Boosts productivity by delivering finished products in lesser time
- Ensures better work environment by ensuring hygiene and safety for workers
- Ensure product quality as machines are less prone to errors
- Enhances competence by standardizing workflows
- Flexibility to manufacture different mattress models



Now, the big question is, where do Indian mattress makers stand in terms of embracing automation? Sreedher Kadambi, Managing Director of SKIL Global Business Solutions says, *"There are some companies that are having reasonable level of automation in the industry while there are some who don't have so much of automation today. In my opinion, the level of automation in the mattress industry can be a lot better than what it is today."* Manufacturers must adopt a holistic approach towards automating their manufacturing facilities. The established mattress suppliers are evaluating every non-value step in their supply chain operations that can be automated and the relatively new players should start early and have a comprehensive plan for automating every possible step in the supply chain that could streamline daily business operations.

### Automation in Indian Mattress Industry

Before embracing automation, one needs to understand the real objective for embracing automation. Mattress manufacturers should not restrict their ideas on automation with regard to getting highly mechanized machines. That is just a part of the solution towards automating the manufacturing facility.

According to Kadambi, there are two areas in a manufacturing facility that needs automation, i.e. the **information** and the **manufacturing** area. Automation can do wonders in both manufacturing and information area. In fact, information is what drives manufacturing. Without

# I Trust My Sleep With Centuary Mattresses, My Sleep Specialist!



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A handwritten signature in black ink, which appears to be 'P.V. Sindhu'.

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information or a proper plan of action, it is difficult to attain efficiency in production processes. Meanwhile, without a proper communication between procurement and suppliers there will not be raw material. Additionally, without adequate and accurate information flow, in the upstream processes, the downstream processes will only suffer.

Manufacturers must consider streamlining and optimizing the information flow, which is in the upstream processes. An appropriate process describing the information flow right from customer order, to the time you start producing the customer order, its adequacy, accuracy must be outlined. Meanwhile, it also must be established whether information flow is happening between the right set of people at the right time. The information transferred should be adequate, accurate and on time. *“Now this part is largely neglected area of automation, wherein, say information flow is usually taken for granted in industries in manufacturing and a lot of issues that you see in the downstream process is the consequence of poor information flow in the upstream process;”* explains Kadambi.

Lot of issues and problems you face in production of mattresses that could relate to how well the information was researched, transmitted and archived. That is the first part, which is the most neglected part in the industry. So, one must look at how AI or automation or any suitable means of automation is potentially streamlined and optimized. How the information flows between various business processes and the steps within those processes from upstream to downstream. That’s one significant area where information automation should play a significant role.

Now, once the information area is clearly established, the production or manufacturing side should pull our attention. It has often been noticed that there are some manufacturing units that run smoothly and the routine jobs are largely

## A well automated mattress manufacturing facility will help reduce production waste and ensure safety of factory workers.

carried out in order, whereas, there are many units that are always in a state of chaos and confusion. This chaos or bad management at the manufacturing floor is most likely to occur due to poor design of the process and the poor process capabilities. Due to poor design and process capabilities, it has been realized that production has not met the delivery dates, not achieved the desired quality and also failed to achieve the targeted costs. So, automation should be perceived in the downstream process as well, to enhance the productivity, efficiency, quality and therefore reduce your cost of goods sold (COGS).

Having a comprehensive plan of production processes will enable manufacturers to have full control over the overall production. Meanwhile, it will help manufacturers streamline the entire production process and expect better return on their investment (ROI). Additionally, it will give them better scope to expand their operations as they can utilize their resources in the most effective manner through automation. Manufacturers should also think meticulously when it comes to evaluate for automation in their manufacturing units.

Through automation, mattress manufacturers can also ensure better ‘inventory management’. There are various raw materials that goes into making a mattress and keeping a watch on the stock of these raw materials will help manufacturers utilize their resources in an efficient manner. And once the final product comes out of the entire production line, it is important to ensure that it goes to the

market.

Another area, where automation could help is to ‘**predict and forecast**’ the demand of the product. What will be the order volumes in the present, future and in the long term? An automated tool that considers the market trends or market consumption pattern or a company’s sales pattern etc. and tell them to some level of precision, what they need to stock and how much they need to stock up each of them? That will have a direct impact on their cash pile in the form of inventory. *“Inventory does not pay off by itself. It’s the money trapped in the system,”* explains Kadambi of Skill Global Business Solutions.

As the mattress industry is getting more competitive, mattress brands must ensure that their products are available at their exclusive retail outlets and in multi-brand outlets. They should be available at the shelves, so that the customer gets limited scope to try the other brand available alongside. Situations like these are easier to avoid if mattress suppliers use automation to predict and forecast their monthly, quarterly and, annual production. With any automated application, mattress manufacturers can get a fair idea about their adequate requirements, which will in turn, help them gear up their entire supply chain operations. Meanwhile, automation will also provide them a good estimate of consumer demand for any particular product at a given point of time. This will help them decide on the right production model, for instance, mass production, batch production, job production, just-in-time production or a flexible manufacturing system. If required, manufacturers can also adopt a combination of some of the models to suit

## Investing in automation in mattress manufacturing will make the industry more productive and profitable.

their demand and supply requirements.

All these key information related to demand and supply of mattresses, inventory availability, time to reach the market can be presented in a unified format through automation. *“From first step to the last step of manufacturing, what do companies need to produce and how much of it they need to produce has to be reasonably automated while it reaches them, before it reaches them. So that, they are not wondering what are they going to produce tomorrow or day after. On the other hand, they are not guessing, if there is going to be change over etc. So, the impact of automation is huge on manufacturing,”* explains Kadambi.

According to Kadambi, another area where automation could help ensure better efficiency by saving time and energy is having some mechanized systems that could move and transport material from one place to other place, thereby, minimizing the effort and the timing, because effort and time comes as a cost. *“Stage by stage, organizations have to consider what steps do they undertake till the time, raw material converts into finished goods, which either goes into a warehouse or it goes to customer directly. Every non-value added step that one incurs in manufacturing on a stage to stage basis is a potential candidate to evaluate for automation,”* says Kadambi.



## Manufacturers must adopt a holistic approach towards automating their manufacturing facilities.

### Embracing Automation: Challenges faced by mattress manufacturers



Automation in the mattress industry is more of a need than an innovative approach. While embracing automation, manufacturers need to assess how much of automation do they need for their daily production. Meanwhile, do they actually need to automate their manufacturing facility? It depends on the volume of business and the cost to benefit ratio. Vijay Palanna, Director of Empulse Research And Data Analytics (India) Private Limited says that automation works well for bigger and established mattress manufacturers rather than the new players who are yet to build up that consumer base. *“Automation brings in numerous advantages like efficiency, standardization, quality control, to name a few. But one needs to do a cost benefit analysis. Automation requires capital investment, so it works well for large manufacturers who have the volumes but it may not be the right decision for small players”* explains Palanna.

Meanwhile, there are other intermittent issues that manufacturers may encounter in terms of equipment failure, technical snags or power shutdown.

### Conclusion

Mattress manufacturers in India had embraced automation long time back and the need for automation is only going to increase with the growing demand for mattresses across the country. Automation is becoming a necessity among long visioned mattress manufacturers as it is required to maintain good quality of mattresses. Manufacturers can vouch on automation for its speed, efficiency and minimum chances for errors. As it saves time, it allows manufacturers to scale their production. For instance, if earlier manual laborers could pack 20 bundles in an hour, now with automation, nearly 60 to 80 bundles can be packed. Automation can also help upto a great extent in managing logistics of mattresses. Mattresses can be loaded onto a truck or delivery van through a conveyor belt, thereby, saving substantial amount of time. For large scale manufacturers, automation works out to be economic while ensuring other advantages like time and cost efficiency, error free operations.

While in traditional mattresses, only 30 to 40 percent of the processes are automated, in new mattress models like ‘bed-in-a-box’ are manufactured in a completely automated environment. As the mattress industry is coming up with newer concepts and manufacturers are looking at tapping the unexplored markets, our mattress factories will have to resort to a completely automated environment. **CT**

### KEY TAKE-AWAYS

- Automation is not a new concept in the manufacturing industry. It helps manufacturing concerns get production processes faster, better and more efficient by eliminating the risk of human errors.
- Though mattress manufacturing business looks positive but there are many concerns that the manufacturers must consider while increasing the adoption of automation in their manufacturing facilities.
- Automation is important in mattress manufacturing as it ensures operational efficiency, optimum time savings, flexibility and scalability and better return on investment (ROI).
- The established mattress suppliers are evaluating every non value step in their supply chain operations that can be automated and the relatively new players should start early and have a comprehensive plan for automating every possible step in the supply chain that could streamline daily business operations.
- Automation can do wonders in both manufacturing and information area. In fact, information is what drives manufacturing. Without information or a proper plan of action, it is difficult to attain efficiency in production processes.
- Key information related to demand and supply of mattresses, inventory availability, time to reach the market can be presented in a unified format through automation.
- While embracing automation manufacturers need to assess how much of automation do they need for their daily production.
- automation works well for bigger and established mattress manufacturers rather than the new players who are yet to build up that consumer base.
- Mattress manufacturers in India had embraced long time back and the need for automation is only going to increase with the growing demand for mattress across the country.
- For large scale manufacturers, automation works out to be economic while ensuring other advantages like time and cost efficiency, error free operations.

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Mr. Anil Kumar PS, CEO, Eastern Mattresses Pvt Limited (EMPL)

Eastern Mattresses has been offering mattresses in the premium segment while staying committed to its sustainability measures. **Mr. Anil Kumar PS, CEO of Eastern Mattresses Pvt Limited (EMPL)** shares the opportunities and challenges in the premium mattress segment in India.

## Premium mattress segment is both an opportunity and a challenge in India

**Q** Please tell us about your journey in the Indian mattress industry?

Eastern Mattresses Pvt Limited (EMPL) restricted its business footprint to only Kerala for almost 15 years. The company registered a turnover of Rs. 50 Crores during 2014-15 with considerable brand equity across Kerala. We have Coir intensive product portfolio manufactured at our Thodupuzha (Kerala) and Hosur (TN) plants.

**Q** What are the opportunities and challenges, when it comes to dealing with premium mattress in India?

Marketing premium mattresses is a huge opportunity in India. Post Covid, consumers are willing to spend on a good quality mattress. However, the challenges to market premium mattresses are many. Mattress is a low involvement and low engagement category. Majority mattress outlets do not offer great user experience to improve the perception of premium mattresses. Mattress sellers lack techno commercial skills to explain the features, benefits and advantages of mattress and recommend an ideal mattress to consumers. False claims, warranties with heavy discounts confuse consumers who intend to buy premium mattresses.

**Q** What is your contribution to the sustainability project of your company?

60 percent of our product portfolio is built around rubberised coir cores. Coir Mattress would be a less worry for land fill vis-à-vis other type of polymer-based core mattresses. We are also using PET recycled fabrics for few product varieties. We also offer coir waste and dust prior to latex compound spray to the neighbouring farmers for their soil productivity enhancement, free of cost.

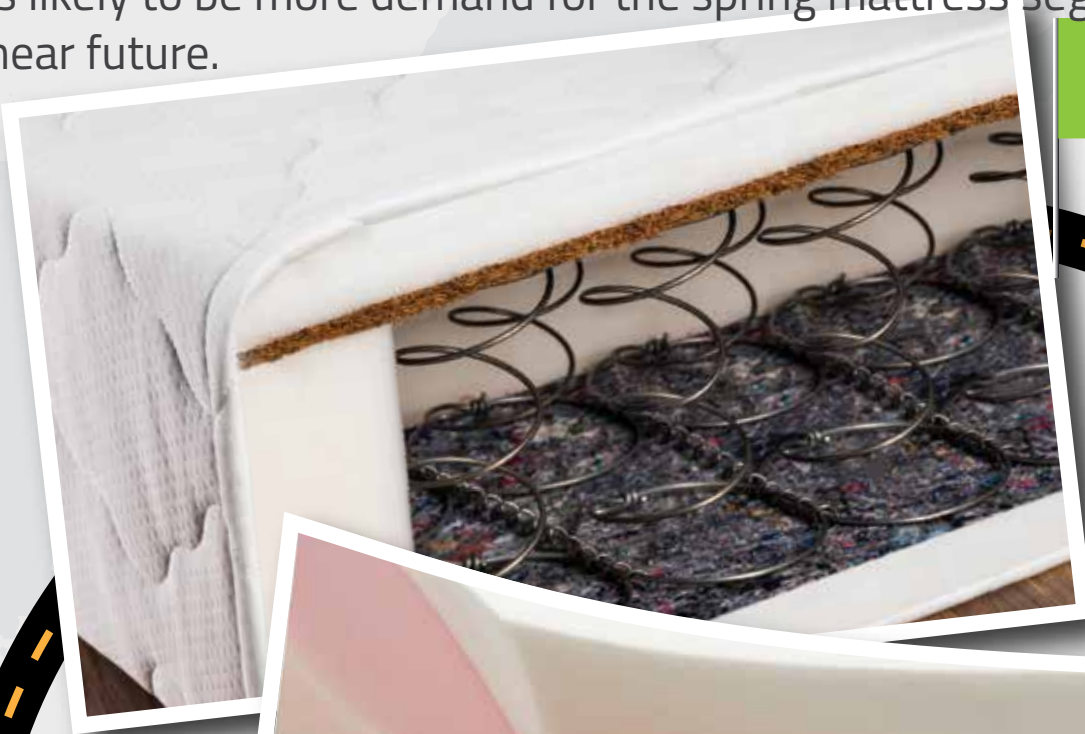
**Q** How do you plan to support the Mattress Circular Journey (MCJ)?

We are happy to collaborate with ISPF or any mattress recycling programs. We are willing to support any chemical manufacturing company who wish to set up a PU Foam recycling plant to extract Polyol. We also wish to reduce the usage packaging material like PVC/PP, if any alternative green packaging solutions are offered to us. We are open to increase consumption of natural green fibre-based fabrics for many product variants. We don't use single grain of EPE in our entire mattress portfolio. **CT**



# Modern Mattress market - Past, present and future analysis

The Coir segment topped the chart in 1980s and PU foam segment is currently dominating the modern mattress industry. However, there is likely to be more demand for the spring mattress segment in the near future.



The Indian mattress industry has always come up with new types of mattresses after analyzing the needs of the customers. While the 1950s and 60s were dominated by cotton and coir mattresses, 1970s witnessed the introduction of polyurethane (PU) foam in India. Then came the spring mattresses. The growth and dominance of each mattress segment (by material type) has been varied at different stages, giving us an idea about the consumers' buying preferences and lifestyle changes at different eras.

Different types of mattresses have contributed tremendously towards the growth of Indian mattress industry as it caters to the varied needs of consumers. In the initial stages of the mattress industry, a limited number of consumers had the purchasing power to buy a cotton mattress but these mattresses shaping up in an uneven manner after regular use caused discomfort. To address these issues, new types of mattresses got launched. The overall Indian mattress market can be classified into cotton mattresses and modern mattresses. According to a Technopak analysis report, *"a major share of cotton mattresses is used by people from rural and semi urban areas, because of their low prices and these are manufactured only by unbranded players. Cotton mattresses are generally priced below Rs 1,500 for a single mattress. On the other hand, a major share of modern mattresses is primarily used in metro, mini-metro, and tier I cities and these are manufactured by both branded and unbranded players. Modern mattresses operate across price segments, with branded mattress prices ranging from Rs 5,000 to Rs 75,000+, whereas unbranded mattress prices ranging from Rs 2,000 to Rs 5,000."*

Based on material type, Indian modern mattress market can be segmented into PU Foam, spring, and rubberized coir mattresses. They have their own set of merits and demerits and each one of these segments have competed with each other with each one commanding a dominating market share at different periods of the mattress industry.

Key market players who have launched their products with either of these mattress materials are trying to

**While the 1950s and 60s were dominated by cotton and coir mattresses, 1970s witnessed the introduction of polyurethane (PU) foam in India.**

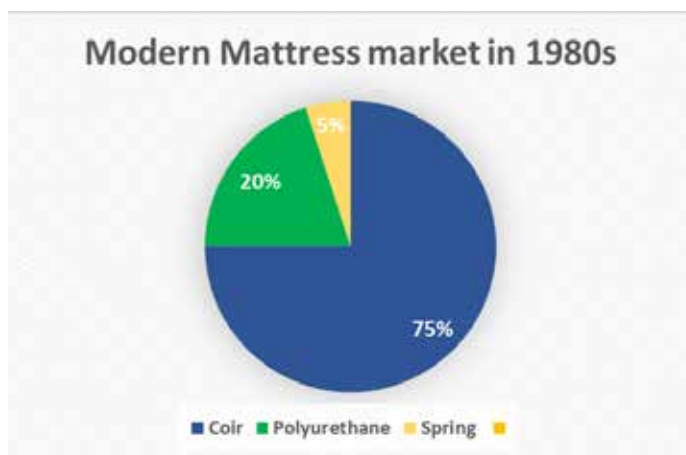
complement their product with the advantages of other material type. For instance, PU foam manufacturers are increasingly resorting to eco-friendly raw materials to make their PU foam products more eco-friendly, in order to lure more environmentally conscious consumers who would prefer coir mattresses for its eco-friendly raw materials. Meanwhile, coir manufacturers are using some foam layers to provide more cushioning and ensure that the rubberised coir does not prick the sleeper.

With this article, we aim to analyze the past, present and future performance of coir, spring and polyurethane (PU) foam mattresses in India. While vaguely analyzing the market share of different types of mattress segment, we got further intrigued to explore further on the journey of these three mattress segment in 1980s, 2000s and 2020s. Let's take a look at the market performance of various mattress types at different times.

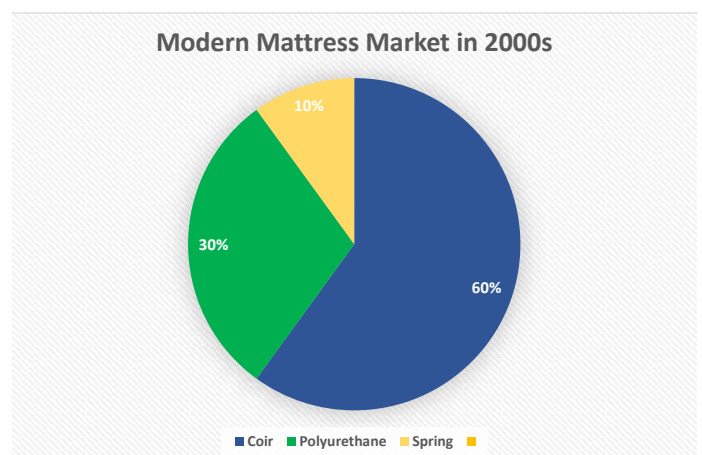
### 1980s: Coir tops the chart

As the Indian economy got into the phase of industrialization and urbanization in the 1960s, the demand for modern beds and mattresses increased. This led to the emergence of a few small-scale mattress manufacturers, who supplied mattresses primarily to the urban middle class. Popular brands that are now synonymous to mattresses came into existence in the 60s.

These early manufacturers produced cotton and coir mattresses, which were affordable and durable. Infact, coir is the first evolution that happened in the Indian mattress



Source: ISPF (Image 1)



Source: ISPF (Image 2)



industry. The coir segment dominated the overall mattress market in India and its dominance continued through 1980s. Coir mattresses came as the best alternative available for Indian consumers, who back then, did not have enough purchasing power or awareness about the benefits of sleep.

According to Indian Sleep Product Federation, in 1980s, coir segment dominated the domestic mattress industry with 75 percent share, while polyurethane (PU) foam segment owned 20 percent share and spring segment had limited presence with only 5 percent share in the overall mattress market. (Refer image 1)

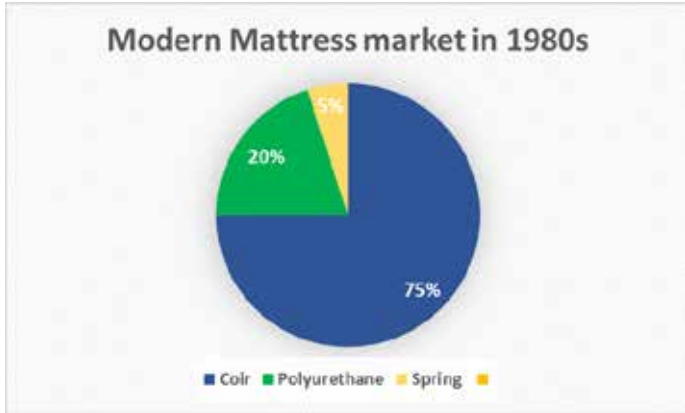
Some of the reasons favouring the dominance of coir segment in India could be attributed to coir being an indigenous product that was produced locally through dried coconut that comprised of long fibre, short fibre and dust. Coir mattresses were relatively more accessible and affordable compared to other types of mattresses that had to be imported from other countries. Moreover, coir mattresses were also seen as a cultural preference in certain regions of India, particularly in the southern states of India where coir production was a traditional industry. This regional affinity was a strong reason that contributed to the demand for coir mattresses. The Indian government promoted the use of coir products, including mattresses, as part of its rural development initiatives, which further increased the demand for coir mattresses in different parts of the country. Meanwhile, PU foam had also entered the Indian mattress industry but it still commanded lesser share compared to coir segment.

**Based on material type, Indian modern mattress market can be segmented into PU Foam, spring, and rubberized coir mattresses.**

#### ***2000s: the growth stage of Polyurethane (PU) foam and spring segment***

As the Indian economy began to liberalize in the 1990s, foreign players entered the market, bringing with them new technologies and materials. PU was imported from Germany unlike rubberized coir that was manufactured indigenously. PU foam attracted attention for its technology, comfort and support and it had emerged as a good alternative. As people started importing PU mattresses, they were levied import duties and other taxes. In the 2000s, the Indian mattress industry saw significant growth, with the entry of several new players and the introduction of modern materials such as memory foam and latex.

A demographic difference was witnessed during this stage, wherein, the rural market demanded more of cotton and coir mattresses, whereas, the high-income groups looked forward to buying spring and memory foam mattresses. According to ISPF, the modern mattress market in 2000s witnessed the market share of coir segment shrinking, while the PU foam segment and spring segment were expanding their presence in the mattress market. While the coir segment still dominated the mattress market with



Source: ISPF (Image 3)

60 percent share, PU foam and spring segment recorded 30 percent and 10 percent, respectively, in the overall mattress market. (refer image 2)

PU foam started gaining popularity because of the cushioning, durability and flexibility it offered compared to traditional mattress materials. The affordability and availability of PU foam made it a popular choice among mattress manufacturers. Additionally, PU foam mattress manufacturers tried out many innovative technology that helped them maintain a cost advantage, while offering variety of products at different price range catering to the needs of the consumers.

**2020s: PU foam leads leaving coir behind**

Currently, PU foam continues to dominate the Indian mattress industry. Its ability to conform to body contours, provide pressure relief and support different sleep positions has made it a preferred choice for many consumers. With the pandemic acting as a catalyst, people are now more health conscious and have started prioritizing sleep to maintain their health. PU foam mattresses are available in a wide range of comfort levels to accommodate individual preferences. With the expanding omnichannel presence by various PU foam mattress companies, the market for PU

**The coir segment dominated the overall mattress market in India and its dominance continued through 1980s.**

foam mattresses is growing bigger each year.

According to ISPF, the modern mattress market is currently dominated by PU foam commanding 55 percent of the market. Meanwhile, coir and spring segment hold a share of 30 percent and 15 percent respectively. (refer image 3)

Another observation from Technopak Analysis mentions, *“As of Fiscal 2023, PU Foam mattresses constituted approximately 50 percent (Rs 8,450 Crore) of the Indian modern mattress market by value, whereas spring and rubberized coir mattresses constituted approximately 22 percent (Rs 3,720 Crore) and approximately 28 percent (Rs 4,730 Crore) of the market respectively. In terms of volume, the market size of PU Foam, spring and rubberized coir mattresses were 10 million units, 2.5 million units and 6.1 million units respectively as of Fiscal 2023.”* (Refer Image 4)

PU foam manufacturers are increasingly shifting their focus on enhancing the properties of PU foam, such as improving breathability and temperature regulation. Manufacturers are also working on innovations like gel-infused or open-cell PU foam that would address issues of heat retention and provide a cooler sleeping surface.

**Road Ahead**

Going by the numbers mentioned above, one can decipher that each mattress segment has maintained its dominance at different phases. However, the consumer preferences keep changing over a period of time owing to various business and circumstantial factors. One more observation that can be noticed from the above numbers is the steady efforts made by spring mattress segment to have its

**Break up of Modern Mattress Market in India based on Material Type -By Value and By Volume in Fiscal 2023**



Source – Technopak Analysis

Note – The total domestic modern mattress market in the graph represents the market at consumer price level.

(Image 4)

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presence in the mattress market.


*“Earlier, the coir used to dominate the market but the recent trend shows the foam mattresses are dominating compared to the other two i.e spring and coir. The spring segment has also grown up considerably because lot of avenues for customers to move out of India enjoying the hospitality at different countries where the spring mattress is more used in the hospitality industry, especially the hotels. So, they come back and search for a range of spring mattresses,”* says Ravi Prasad, Chief Product Officer at Kurlon Enterprise Limited.

Even a Research and Markets report points out that *“Indian consumers usually prefer a coir mattress or a foam mattress but the demand is now changing towards spring mattresses. Globally, majority of sales is in the spring mattress segment while in India the spring mattress category is at a nascent stage.”*

A vague analysis of all three types of mattresses will make us realize that each type of mattress has its own set, of merits and demerits. Coir mattresses are eco-friendly and considered healthy but they tend to sag very soon, resulting in low replacement cycle. PU foam mattresses offer better comfort and cushioning while being cost effective but a lot of chemicals goes into making them for which growing number of health-conscious consumers may refrain from demanding more of PU foam mattresses. Spring mattresses may offer more comfort but it can wear out faster, if not maintained properly.

Market players in these respective segments are trying to work on the weaknesses of their products to ensure that they match up to the advantages offered by their competing segments. There is a remarkable shift in the consumer mindset these days with a greater number of people showing inclination towards sustainability, recyclability and reusability. *“Now people talk about sustainability and recycling. The focus has slowly come on products which are sustainable, recyclable or reusable and the importance of rubberised coir has slowly started growing up compared to others. So, the focus of every company who is selling mattress will be on the sustainability factor to see that every product used should be*

*natural and sustainable. So, I believe that in days to come, the coir mattresses will regain its importance again. It’s awareness is very high in the western countries, not only in India. So, now people are searching for rubberised coir mattresses, especially South Asian countries have started exporting this and this trend will again come back to India and regain importance,”* explains Ravi Prasad of Kurlon Enterprise Limited.

In a nutshell, coir segment dominated the past and the present belongs to the PU foam segment. Meanwhile, spring segment is still at a nascent stage in India but is likely to grow in near future. What initiatives various market players in these three segments will take, will be an interesting development to watch out. 

### KEY TAKE-AWAYS

- According to Indian Sleep Product Federation, in 1980s, coir segment dominated the domestic mattress industry with 75 percent share, while polyurethane (PU) foam segment owned 20 percent share and spring segment had limited presence with only 5 percent share in the overall mattress market.
- In 2000s the coir segment still dominated the mattress market with 60 percent share, PU foam and spring segment recorded 30 percent and 10 percent in the overall mattress market.
- The modern mattress market is currently dominated by PU foam commanding 55 percent of the market. Meanwhile, coir and spring segment hold a share of 30 percent and 15 percent respectively.



*Mr. Gaurav Sachdeva, Director, Chemie Products Private Limited*

**Mr Gaurav Sachdeva, Director** *Chemie Products Private Limited* shares the journey of Chemie products since 1996 and how the company has been contributing towards the growth of the PU foam industry in India.

## Making innovative products to make PU more customizable

**Q** Please share about the journey of Chemie products till date. Please explain about your contribution in the Polyurethane segment?

Chemie Products Private Limited was established in 1996 by Mr. Ashok K Sachdeva as a manufacturing company for PU Color Paste for Flexible Slab-stock foam Industry. Back then, all colors for foam industry used to be imported and therefore, our company helped in localization of the color industry in Indian market. This offered PU Industry with more variety of colors, faster delivery time and cost competitiveness.

**Q** How is your company working towards helping the PU foam segment grow in India and offer better alternatives than its peers like coir and spring segment?

We have been developing products for import substitution, cost competitiveness and new product demands for PU Industry. Our Liquid colors offers a cost-competitive solution than imported colorants while maintaining all quality parameters. Our Release Agents help in moulded foam production thus making Pillows and Moulded mattresses. Our Binder helps in recycling PU foams and provide high hardness to provide structural stability in mattress while maintaining flexibility. Our FR, UV, colors, coatings, help in making the product much more versatile and usable in various applications. PU is already far more customizable product as compared to Coir or Spring. Our focus is to make products that makes it even more customizable.

**Q** How do you plan to support the Mattress Circular Journey (MCJ)?

We are supporting the mattress circular journey by being a key partner of the industry by manufacturing and providing PU Binders which acts as an adhesive for PU foam scrap to make re-bonded foam which has many useful applications like orthopedic mattress or to provide structural stability in the Mattresses. These re-bonded foams are also used in NVH for noise and vibration insulation in Automotive Industry amongst many other applications. Therefore, there is such huge demand for scrap foam due to its usage that very few mattresses should land up in the land-fills. We are continuously working for some new products to empower the Mattress Industry for new achievements. **CT**

# Managing logistics in mattress industry

Mattress companies in India are improving their logistics set up to ensure efficiency in their business operations. Though better use of logistics has changed the way mattress industry operates in India but the fact is logistics costs in India is too high and is a huge cost to mattress companies.





Logistics is the backbone of any business. An efficient logistics sector of a country can contribute towards the growth of its economy. According to a recent EY report, titled 'India@100: realizing the potential of a US\$26t economy', India is projected to grow to US\$26t by FY48. India's transportation and logistics sector can act as the backbone to support this fast-paced growth, which the country is poised to achieve in the next 25 years.

If we just look around, everything that we order over phone and is delivered at our doorstep between few minutes to few days, is all backed by efficient and robust logistics. Even in the Indian mattress industry, logistics plays a very important role. For an industry that is working aggressively towards increasing its share in the overall market pie, having a strong logistics set up is quintessential. With e-commerce and D2C model being a trend in shaping up the Indian mattress industry, it is important to analyze the role of logistics in the Indian mattress industry. The logistics in the Indian mattress industry is significantly improving as the industry witnesses growth due to factors like increasing demand for mattresses, expanding e-commerce platforms and raising awareness about the importance of quality sleep.

### Importance of Logistics in mattress business

Mattress makers in India are trying various ways to ensure customer satisfaction. Meeting the explicit and implicit need of consumers is the need for any business across various business domains and the mattress industry is no exception. The logistics in the Indian mattress industry are progressing to meet the growing demands and expectations of customers. From improved warehousing and transportation to efficient last-mile delivery options, the industry is focusing on providing a seamless experience for customers in the mattress buying process.

Mattress manufacturers and retailers are investing in spacious and well-equipped warehouses with temperature control systems to store their products. Companies are using efficient transport modes like trucks, vans, and even specialized vehicles equipped to handle large-sized mattresses to ensure safe and timely delivery to customers. The last-mile delivery, which involves transferring mattresses from distribution centers to customers' homes, is becoming more streamlined. Companies are partnering with courier and delivery services to provide efficient and quick deliveries. Additionally, companies are also adopting technology like GPS tracking systems to track deliveries in real-time.

The rise of e-commerce platforms and Direct to consumer (D2C) model has revolutionized the logistics in the mattress industry. Customers can now purchase mattresses online and have them delivered safely to their doorsteps. E-commerce platforms are collaborating with logistics partners to ensure smooth delivery experiences for customers. Companies are investing in sturdy and protective packaging materials to safeguard the mattresses from any

## India's transportation and logistics sector can act as the backbone to support this fast-paced growth, which the country is poised to achieve in the next 25 years.

damage during transit. *"Most of the brands, have opened up stores and warehouses everywhere, so instead of sending it from factory, they keep stocks ready at very vulnerable points. This has made mattress delivery easier and there has been a great improvement in mattress logistics now,"* explains S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF). He also explained that these days mattresses are delivered within 24 hours, whereas, earlier, delivery of mattresses would take upto a week.

The D2C model has gained a lot of popularity and it has been observed that it is one of the most preferred models for startups. D2C model allows startups to eliminate the middlemen involved in the distribution of mattress, allowing the mattress makers to have complete control over the entire customer experience. Through this model, mattress companies can cut out the costs involved in engaging the middlemen, rather, they invest the available financial resources towards ensuring efficient logistical practices.

Many D2C mattress brands offer trial periods and hassle-free return policies to customers. This allows customers to try out the mattress in their own homes and return it within a specific time frame, if they are not satisfied. As D2C mattress companies deal directly with customers, their logistics arrangement should be more efficient than traditional mattress companies. There are higher chances of reverse logistics in D2C businesses as customers may call the company back for return or exchange of mattresses. As Sundaresan of ISPF mentions, reverse logistics has also become easier these days. This gives good scope for D2C businesses to thrive in the highly competitive mattress market.

Meanwhile, experienced players in the mattress market are also offering online deliveries of their sleep products either through their exclusive online stores or various online marketplaces. In addition to that, they too, have consumer-friendly return policies, meaning their logistics set up should be strong enough to cater to these requirements.

The 'Bed in a Box' concept is gaining popularity due to the logistical convenience offered by these models. For instance, in tier-1 cities, wherein, most people reside in high storied buildings, 'bed-in a box' works out to be a convenient buy due to easy logistics processes. The box can easily reach any floor through a lift and can be assembled at home. It saves cost incurred on manpower and the time that goes into supervising the correct handling of the product.



Logistics has been an important part of mattress business and with the industry shaping up with new ideas and business models, it's going to get more important for mattress companies to make their logistics setup more streamlined and efficient. Through the deployment of right technology, mattress companies can witness a positive impact on their logistics management. *"Technology has made logistics easier, in terms of letting retailers know about the stock availability in other warehouses in close proximity. So instead of getting a new mattress manufactured from a factory, retailers can get the stock from the nearby warehouse and deliver it to the customer on time,"* explains Sundaresan.

### **Role of technology in managing logistics**

Technology impacts logistics management by enhancing inventory management, optimizing warehouse operations, streamlining transportation, facilitating demand forecasting, improving customer service and providing valuable data insights. By leveraging technology, companies can ensure better operational efficiency, reduce costs and deliver better customer experience. Technology has made logistics in mattress industry easier, in terms of:

- Stock or Inventory Management
- Efficient and faster Warehouse Operations
- Transportation Management
- Demand Forecasting and Planning:
- Customer Service and Communication
- Data Analysis and Visibility

However, this is the ideal way in which technology can facilitate better logistics management. The role of technology in daily logistics management in mattress industry still has a lot of scope for improvement. *"The role that technology should play in managing logistics is not being played well. The ERP, application systems in many of these companies, is sub-optimally implemented, wherein, the logistics part of it is by and large managed manually, in terms of, procurement, shipping in the warehouse. In other words, the technology has to play a pivotal role in managing logistics and supply chain which is not done, as of today. I would say, it is a huge opportunity in improving the role of technology in logistics and supply chain management. And there is a distance to go by these industries, especially in terms of, precision and adequacy of forecasting, arrivals of materials into the factory, integrated with your suppliers in one platform and working seamlessly and shipment of goods, either B2B or B2C to your customers, providing them a fair level of visibility and transparency and predictability of when they are going to receive the goods,"* explains Sreedher Kadambi, Managing Director of SKIL Global Business Solutions.

### **Conclusion**

Logistics plays a very important role in ensuring smooth functioning of mattress deliveries. Mattress companies prioritize customer satisfaction and hence, maintaining smooth logistics function is quintessential for the mattress companies operating in India.

# DIAMOND

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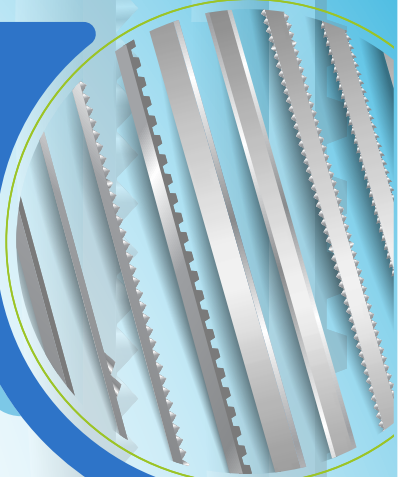


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According to a report released by Aviral Consulting in 2022, *“Government initiatives to develop infrastructure and implementing new tax regime GST have changed the express logistics business. Express Logistics companies in India are moving from traditional set ups towards integration of IT and technology and this is expected to reduce the costs incurred and meet services demands. Government’s initiative “Make in India” is expected to boost the manufacturing sector to 10 percent growth.”*

The numbers may look promising but the fact remains that logistics costs are quite high in India making it difficult for companies to stay profitable. The Aviral Consulting report mentions that USA spends 9.5 per cent of the GDP on logistics while Germany is even more competitive with a share of eight per cent. Higher logistics costs in India could be ascribed to the lack of efficient inter-modal and multi-modal traditional systems, thereby, presenting significant future scope for development and efficiency. Himanshu Mehta, Managing Director at Himrag Coir Products Private Limited explains, *“During the pandemic, delivery companies had imposed substantial price rise on all deliveries. There is no remarkable advantage as far as logistics is concerned because of the increase in fuel prices and the prices imposed by logistics companies in India.”*

The rising costs of logistics is one of the primary concerns for mattress companies. With higher prices imposed by logistics companies, it will be difficult for mattress companies to stay profitable.

To ensure customer satisfaction, mattress companies are offering trial and easy return policies. Cases of reverse logistics could also add up to the logistics costs to the company. While established players have their own network of distribution centers to optimize logistics costs, for new players it is still a challenge to stay profitable due to rising cost of logistics. Though the benefits of logistics with the intersection of technology is tremendous, it is still exorbitant for an industry, wherein, the organized players are yet to grab a dominating market share. However, the positive part is logistics in the Indian mattress industry is getting more streamlined and with better deployment of technology, it is likely to get more streamlined and cost effective. 

**For an industry that is working aggressively towards increasing its share in the overall market pie, having a strong logistics set up is quintessential.**

### KEY TAKE-AWAYS

- According to a recent EY report, titled ‘India@100: realizing the potential of a US\$26t economy’, India is projected to grow to US\$26t by FY48.
- The logistics in the Indian mattress industry is significantly improving as the industry witnesses growth due to factors like increasing demand for mattresses, expanding e-commerce platforms, and raising awareness about the importance of quality sleep.
- From improved warehousing and transportation to efficient last-mile delivery options, the industry is focusing on providing a seamless experience for customers in the mattress buying process.
- Customers can now purchase mattresses online and have them delivered safely to their doorsteps. E-commerce platforms are collaborating with logistics partners to ensure smooth delivery experiences for customers.
- D2C model allows startups to eliminate the middlemen involved in the distribution of mattress, allowing the mattress makers to have complete control over the entire customer experience.
- Logistics plays a very important role in ensuring smooth functioning of mattress deliveries. Mattress companies prioritize customer satisfaction and hence, maintaining smooth logistics function is quintessential for the mattress companies operating in India.
- While established players have their own network of distribution centers to optimize logistics costs, for new players it is still a challenge to stay profitable due to rising cost of logistics.



*Mr Manish Parekh, Joint Managing Director, Nilkamal Limited*

A reputed name in the furniture category, Nilkamal, forayed into the mattress segment three years ago. Nilkamal is yet to contribute significantly to the Indian mattress industry, however, the company has taken cognizance of the opportunities and challenges facing the domestic mattress industry. In an exclusive interview with Comfort Times, **Mr Manish Parekh, Joint Managing Director at Nilkamal Limited** shares his opinion on various factors affecting the Indian mattress industry.

## Going beyond plastic furnitures

**Q** Nilkamal has various offerings in the home furnishing and industrial products segment. So, what is your contribution in the mattress business and how are you planning to take this up?

Currently, our contribution in the mattress business is almost insignificant. As you rightly said, we are connected to the home category. There are two brands that we run. One is Nilkamal and the other is @home. We have the retail outlets also and we are beyond plastic furnitures now. So, we are dealing with all kinds of furniture and home décor products. @home is a complete home store solution. So therefore, we felt there was a gap in terms of, mattress because Nilkamal is a highly distributed product in terms of, our furniture category (plastic furniture) and we came across several of our furniture dealers who also sell mattresses. So, that is the reason we entered this business three years ago. So far, our focus has been more on the small furniture outlets. Going forward, the plan is to look at other multi brand outlets, mattress outlets, furniture cum furnishings outlets also. So, its mix of everything and we would like to grow through the trade channel, ecommerce and our own franchise and retail outlets.

**Q** What are the opportunities that you think are available for the Indian mattress industry?

Opportunity is of course, the youth. As we know, the Indian story and how the Indian middle class is burgeoning and growing rapidly. If our political situation remains stable, I think there is huge consumerism that will take place in the next 10 to 15 years. For people with higher income levels, there will be a huge growth that is expected to happen. And if you are an organized player with good quality products and good after sales service, I think there is a market for many players in the mattress segment. More number of people are becoming health conscious and the psychology of using a good mattress is rising and people are becoming more aware and they are looking for comfort in their mattress and they are willing to invest. So, this will all happen just like any other nation which has grown over a period of time. The market is huge with this kind of population that we have and its long-term business.

**Q** Where is the major challenge that the Indian mattress industry is facing?

Based on our market feedback, the unorganized sector is also doing reasonably well and they are picking up. Another issue is of course, of the 'counterfeit' that is rampant specially in north and east of India. We are coming across this as very big issue



and a lot of small and totally unknown players are selling spurious materials and so many other different brands are available. It is a big issue and we have conducted few raids. We have gone after them and we are trying to set examples. But it's kind of a full-time job at the moment.


**Q** How do you plan to support the Mattress Circular Journey (MCJ)?

We are completely supporting it and we have tied up with the 'kabadiwala' trying to ensure where the dealers can pick the mattress back from consumers and give it to kabadiwala. I think, so far this project has not yet taken up very well. Somehow, the retailers are reluctant to pick up the mattress from the consumer and then keep it because it a voluminous product and they don't have space. So, keeping these mattresses and then going on the computer and digitally connecting it to the kabadiwala to come and collect that. I think somewhere they are losing that enthusiasm.

**Q** What is Nilkamal's contribution to the sustainability project?

So basically, our power consumption is through solar in all our units, so when we are manufacturing the mattresses and products, it is through the solar and wind power that we are using. And some of the mattresses which come back to the company, in terms of, quality issues or complaints or anything, we tend to reuse it terms of, bonded foam. These are couple of actions that we have taken.

**Q** Any new range of products that you are looking to launch?

Launching new range of products is a continuous affair. We have launched quite a few products like zero motion for couples, special spine health support technology that we have brought in and there is a special side sleeper mattress, for the first time that we have brought in the country. So, that is a continuous journey. 

# Marketing and branding measures by mattress brands in the digital age

The Indian mattress industry has enough headroom for further growth and therefore, it is imperative for brands to leverage effective marketing and branding measures through the digital medium to connect with prospective consumers. Growing awareness about different kinds of sleep products available in the Indian market will help the domestic mattress industry drive sales.



Consumers are changing these days and therefore, their dynamics with various brands is also changing. Marketing and branding initiatives that largely aimed at 'selling the brand' has now taken a fresh approach i.e to establish a meaningful connection with consumers who are more well informed than before. Consumer engagement with the brand is now the central focus for every business. Brands are increasingly engaging with consumers through digital medium to connect with their target audience and understand their key requirements. As far as the Indian mattress companies are concerned, brands are now focussing more on selling the 'idea of sleep' rather than selling sleep products like mattress, pillows, protectors etc. Indian mattress brands are resorting to various brand building initiatives. Companies in the mattress industry are focusing on brand building through ATL and BTL marketing. Marketing campaigns focused on superior comfort and support are being designed by companies to increase brand awareness. Television, print, outdoor (billboards and movie theatres), digital media and celebrity endorsements are being used as marketing medium for ATL brand building. Companies are also undertaking BTL marketing initiatives such as in-store promotions and direct mail campaigns, that helps them to reach out to customers, personally.

Now, the big question is how much efforts should mattress brands invest towards marketing and brand building? Is it the right time for brands to invest towards expanding their brand presence? If we go by some numbers outlined by Technopak Analysis, *"The global mattress market has exhibited continuous growth over the years, which has grown at a CAGR of approximately 10 percent from US\$ 27 billion in calendar year 2017 to US\$ 44 billion in calendar year 2022 and is further expected to grow at a CAGR of approximately 6 percent until calendar year 2027 to reach a market value of US\$ 59 billion."*

If we narrow down to different geographies, Asia Pacific constitutes a major share of approximately 39.73 percent (US\$ 17.48 billion) of the global mattress market as of calendar year 2022, owing to the large populations in India and China. Additionally, urbanisation, growing middle class, increasing disposable income of people and increase in housing units and growth of hospitality sector in the Asia Pacific region, has been responsible for its higher share.

However, the Technopak Analysis report also indicates that India's per capita spend on mattresses is low as compared to its global peers. While the global average per capita spend on mattresses is estimated to be approximately US\$6 in 2022, India's per capita spend on mattresses is at approximately US\$4, which is low compared to other countries like USA and Australia. These numbers suggest that there is enough headroom for growth of mattress sector in India.

Indian mattress brands have enough opportunity to tap more customers, who now have more purchasing

## Brands are increasingly engaging with consumers through digital medium to connect with their target audience and understand their key requirements.

power than before. And to get the attention of the targeted consumers, mattress brands need to invest more resources and deliberated efforts towards their branding and marketing initiatives. Various brands are implementing different marketing campaigns to build more awareness among consumers about their brand and their product lineup. In the recent years, the ingress of startups to the domestic mattress industry has pestered established brands also to rethink their marketing campaigns.

### *Marketing and branding measures by Indian mattress brands*

After the unfeasibility of cotton mattresses that used to get uneven after regular use, Indian mattress companies explored other options that would deliver better sleep experience to consumers. That is how coir mattresses came in as an option for consumers who took a lot of time to get convinced about investing on a coir mattress. Industry veteran, R Raghuraman, Managing Director of Fibroflex India recalls that back then, there was limited advertising and marketing of mattresses. They had to share free samples of rubberised coir to consumers, who explicitly complained as to why they should be paying only for coir product as the rubber was invisible. This struggle continued upto 1970s and mattress companies with their limited means tried convincing people to try out rubberised coir mattresses.

In 1990s, when the Indian economy got liberalised, many foreign players entered the Indian mattress market bringing new technology and materials. Though the Indian mattress market already had Polyurethane (PU) mattresses, it was in 2000s that the domestic mattress market had various types of mattresses, namely, PU foam, rubberized coir, spring mattresses, air beds, water beds. This period also saw the growth of specialty mattress segments, such as orthopaedic and luxury mattresses.

With so many options available for the consumers, there was a need to inform consumers about various types of mattress products and their USPs. Earlier, mattress companies primarily focussed on selling their brand. However, with time, brands realized that they need to adopt an approach that would connect with consumers and change their mindset about sleep products and mattresses.

At the ground level, brands and industry bodies like ISPF are initiating training programmes to train retailers to educate their customers about the importance of sleep. It



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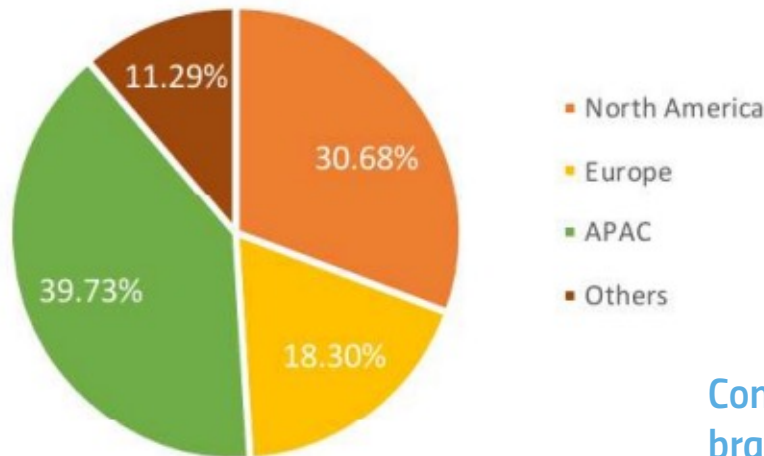


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## Break up of Global Mattress Market by key geographies - By Value in calendar year 2022



Source – Technopak Analysis

is only when consumers value the importance of sleep, it is more likely for mattresses to sell in larger volumes. It is high time that people realize the importance of sleep and for this reason, manufacturers and retailers should elevate the conversation around sleep.

World of Sleep is an initiative of HGH India and ISPF (Indian Sleep Products Federation) to showcase Indian and global innovations in sleep product materials, designs and technology leading to improved quality and performance for their users. The World of Sleep serves as an educational platform for consumers, enabling them to learn about the importance of sleep, sleep disorders and sleep-related products. This awareness creates a demand for high-quality mattresses and other sleep products, contributing to the growth of the Indian mattress industry.

Brands that earlier focussed on the features and benefits of sleep products and mattresses have now shifted their focus on discussing about the importance of good sleep. For this reason, established and new mattress brands have signed up with celebrities to promote the idea of sleep among their target audience.

In the recent years, especially after the pandemic, many brands have been exploring the content space to implicitly spread the message of the importance good sleep among people. For instance, Duroflex had launched an audio led content called 'Sounds of Sleep', which was a digital music experience that explored the role of music as a sleeping aid. The first season of Sounds of Sleep was launched on the occasion of World Sleep Day 2021 and was a curated collection of popular regional lullabies across India celebrating and reviving one of the oldest pre-sleep routines. This digital music experience by Duroflex was hosted by actor and mother Kalki Koechlin.

Meanwhile, Wakefit has its Sleep Internship Program,

## Consumer engagement with the brand is now the central focus for every business.

wherein, they hunt for a professional sleeper. The company ideates original content with an intent to promote the benefits of good sleep. In an exclusive interview with Comfort Times (refer last issue), Ankit Garg, CEO and Co-founder, Wakefit.co said, *"We always aim to execute informative, quirky, and out-of-the-box campaigns that resonate with the emotions of our customers."*

At the brick-and-mortar front, brands are increasingly giving importance to dedicated sleep zones, wherein, customers are suggested to sleep on the mattress and get the real feel of it. It helps them make a firm decision with regard to the purchase of the mattress. Many brands even have sleep showrooms, which is popularly called 'sleep centers'.

Though Indian mattress brands are resorting to numerous measures to build their brand among consumers but initiating marketing and brand building measures may not be the only feasible option to drive sales for mattress companies due to the nature of the category. Vijay Palanna, Director of Empulse Research and Data Analytics points out that mattresses are a difficult category. He explains, *"Mattresses and sleep products are difficult category. For any other category it is easier to push your brand through dedicated digital marketing and social media marketing efforts but for mattress companies, the challenge for them is people replace the mattress only when it is very old. You can replace or trade in any other product because it is affordable to you. But this is not possible in the case of a mattress. However, companies must aim at building that awareness about their brand, so when it's time for them to buy, they will probably buy the brand that they remember."*

### Leveraging the digital medium

Brands across all sectors are leveraging the digital medium to connect and engage with their customers. During the pandemic, due to covid induced restrictions, brands

**In the recent years, the ingress of startups to the domestic mattress industry has pestered established brands also to rethink their marketing campaigns.**

increasingly explored audio and voiceovers to create engaging content for social media. Quirky and relatable content helped them engage well with consumers. There are numerous ways in which brands are leveraging the digital medium. For instance, they create engaging and interactive websites that provide detailed information about their products, including specifications, customer reviews, and FAQs. A strong online presence helps them establish credibility among potential customers. Many mattress brands collaborate with influencers in the digital space to promote their products to a wider audience. They provide influencers with free mattresses or sponsorships, who then create content and reviews about the brand, reaching their dedicated followers and potential customers. Targeting micro influencers helps them reach many customers from untapped markets.

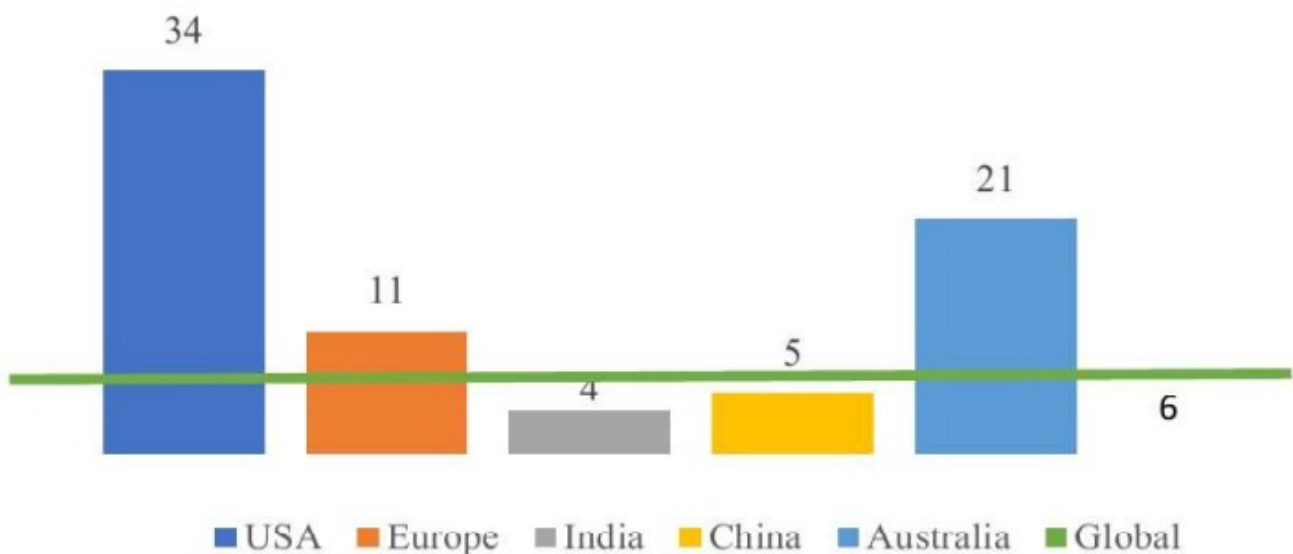
Mattress brands utilize various digital advertising platforms, such as Google AdWords, YouTube Ads, or social media ads, to target specific demographics. They use data-driven strategies to reach potential customers who



Inbarajan S, CEO of Fuego Media Services who has worked with 300+ brands says, *"These days only 20 percent of marketing budget goes to ATL and BTL marketing services like hoardings, ad films, newspaper etc. I am talking about brands that used to spend crores*

*in advertisements some 10 to 15 years back. Now, they have downsized and are investing on the digital platforms. After knowing the power of digital, they are ready to spend 80 percent of their budget in digital advertising and marketing. Now, they are also trying to reduce the cost in an optimum way to get better reach and better results."* According to Inbarajan, brands get quality leads for their products or services, if they go digital. *"In a period of two years, more than 40 new brands have come online. People aged between 20 and 40 are all wedded to the digital world. They spend most of their time on the web. For instance, they want they a mattress, they will browse and there are so many solutions available. Then immediately after that, they find out what are the features, advantages and benefits of each mattress. Currently, all the top brands have a separate sub brand for their customers online. Every brand has a separate brand for its online customers. So that has motivated people to*

*Per Capita Spend on Mattresses - By Value in calendar year 2022*



Source – Technopak Analysis



### KEY TAKE-AWAYS

*go digital,”* explains S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF). Digital platforms also allow mattress brands to gather and analyze consumer data to personalize their marketing efforts. They utilize data on consumer preferences, search behavior and demographics to deliver targeted ad campaigns and other personalized experiences, increasing the chances of reaching potential customers.

#### Road ahead

Amidst several challenges, the Indian mattress industry is working hard to drive sales by building consumer awareness through effective branding and marketing initiatives. With a greater number of people getting engaged in the digital platforms, it is getting imperative for brands to connect with consumers through various digital channels. Mattresses and sleep products are now emphasizing on selling the idea of ‘sleep’ and ‘comfort’ through quirky and humorous advertisements. When consumers connect to a brand, they are more likely to consider the product before buying a mattress. In the recent years, brands have been able to convert many leads to customers by leveraging effective branding and marketing campaigns through digital platforms. It is time for mattress brands to attract more buyers by building their awareness. As mentioned in the Technopak Analysis report, India’s per capita spend on mattresses is low compared to other countries like USA and Australia. While the industry is working meticulously to make more innovative products while maintaining the price advantage, it is important for brands to build effective marketing campaigns which will not only build consumers’ awareness about the importance of sleep but will also pester them to buy good quality mattresses and sleep products. With more consumers buying mattresses, the organized segment of the Indian mattress industry will get stronger and register more growth in the coming years.. **CT**

- As far as the Indian mattress companies are concerned, brands are now focussing more on selling the ‘idea of sleep’ rather than selling sleep products like mattress, pillows, protectors etc.
- If we go by some numbers outlined by Technopak Analysis, “The global mattress market has exhibited continuous growth over the years, which has grown at a CAGR of approximately 10 percent from US\$ 27 billion in calendar year 2017 to US\$ 44 billion in calendar year 2022 and is further expected to grow at a CAGR of approximately 6 percent until calendar year 2027 to reach a market value of US\$ 59 billion.
- Asia Pacific constitutes a major share of approximately 39.73 percent (US\$ 17.48 billion) of the global mattress market as of calendar year 2022, owing to the large populations in India and China.
- India’s per capita spend on mattresses is low as compared to its global peers. While the global average per capita spend on mattresses is estimated to be approximately US\$6 in 2022, India’s per capita spend on mattresses is at approximately US\$4, which is low compared to other countries like USA and Australia.
- When consumers connect to a brand, they are more likely to consider the product before buying a mattress. It is important for brands to build effective marketing campaigns which will build consumers’ awareness about the importance of sleep and pester them to buy good quality mattresses and sleep products. With more consumers buying mattresses, the organized segment of the Indian mattress industry will get stronger and register more growth in the coming years.



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Mr. Rohan Patel, Director-Sales, Refresh Mattress.

With 70 + models to fulfil their consumers' sleep requirements, Refresh Mattress has products for different consumer segments. In an interaction with Comfort Times, **Mr Rohan Patel**, *Director- Sales at Refresh Mattress* discusses about the changing consumer mindset and their commitment towards offering good mattresses while maintaining the price advantage.

## 'Even value driven consumer should have the right to good sleep'

**Q** Please tell us about Refresh Mattress' various offerings for the Indian market?

We have a wide range of mattresses starting from Rs. 5000 per pair going to Rs. 1.5 lacs per pair, which covers each and every aspect of sleep. Specifically, I want to talk about our entry level range and top category which are RTGS and Naturals - thought behind RTGS was even value consumer should have a right to good sleep (RTGS), hence the name RTGS and our top category - Naturals series, which offers exclusive range in India. We have tied up with some companies in Thailand, Turkey and UK to make this range very exclusive to help our consumer who are facing different issues regarding sleep.

**Q** How has consumer mindset changed over the years? What are their current preferences with regard to sleep products and mattresses and how have you been able to address their demands?

There was a time when everyone was running behind orthopaedic mattress now time has changed, the young generation wants soft and luxurious mattresses, specially, with springs and memory foam. These two products were available only in high-end but with the help of our inhouse R&D team, we are able to offer them towards medium budget consumers also.

**Q** Please describe about your presence across India through your distributors and dealers. How are you leveraging the digital medium to expand your reach across the country?

We have a vast network throughout India to cover the demand from every part of India. We have Company owned exclusive showrooms, a vast distribution network, MBO's and our service centers across the length and breadth of the country. We use digital platforms like FB, Instagram, twitter etc. very effectively to reach the customer.

**Q** What is your contribution to the sustainability project of your company?

Sustainability as in our case, mainly comes the International RM supplier's job. However, we use some green polyols and recycled mattresses at our facilities.

**Q** How do you plan to support the Mattress Circular Journey (MCJ)?

We are actively manufacturing, marketing and reaching the consumer and at the end of the life cycle we recycle 15 to 20 percent of our products. **CT**

# RETAIL TRAINING

## Helping retailers cope up with new strategies

With the emergence of D2C model, retailers need to be trained well enough to compete against the new model. Manufacturers and industry bodies like ISPF could help towards training the retailers who could push their brands to consumers.



There has been a remarkable shift in the retail dynamics in the Indian mattress segment. Traditionally, mattress companies would resort to retailers and other channels of distribution to sell their mattresses to the end consumers. However, the sales scenario is different these days. With the emergence of D2C model and trial policies, bed in a box models, the traditional retailers are apparently facing more competition than before. With the pandemic acting as a catalyst, consumers are not shying away from experimenting the online route for making mattress purchases. Meanwhile, lifestyle preferences among consumers is also changing. For instance, the bed in a box concept is more preferred than before with many people living in higher floors of highly raised buildings. *"The bed-in-a-box concept is catching up very soon among the urban population who find it logistically more convenient,"* explains S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF).

New mattress brands that are directly reaching out to the consumers through the D2C route are posing a bigger challenge for retailers by making sales processes more convenient through a click on a web or mobile interface. However, it would be too early to say that the era of retailers is going to end. Majority of Indian consumers are still inclined towards ensuring 'value for money' offered by any product. Mattresses have more shelf life compared to other products and hence a lot of consumers still consider experiencing the product in a real time scenario before buying it. That is where retailers can make a difference and ensure that consumers prefer buying mattresses from them.

### Challenges faced by retailers

There are some retailers who know their job well and they have a loyal consumer base. However, many retailers across the country find it difficult to sell enough products in their inventory. Additionally, if we consider the tier 2 and tier 3 cities, retailers have an even bigger challenge of getting enough consumers with sufficient purchasing power. There is a need for retailers to get enough understanding about their consumers requirements and they must train their staff as well, to follow the same protocols to sell enough products.

The Indian mattress industry is becoming highly competitive with both local and international players trying to grab a market share. This is the biggest challenge for retailers who often fail to differentiate their offerings in the market. Low consumer awareness is another major problem faced by retailers. Retailers often find it difficult to push sales for mattresses as majority of Indian consumers are yet to understand the importance of good sleep in their lives. Even if consumers understand the importance of sleep and they look forward to buying a mattress, they need to be convinced further about the price. Indian consumers largely look for value for money offered by a product and for this reason, they research extensively about the product and the comparison largely happens on the basis of price. In such conditions, it becomes difficult for retailers to maintain

**With the emergence of D2C model and trial policies, bed in a box models, the traditional retailers are apparently facing more competition than before.**

competitive pricing while maintaining profit margins. Meanwhile, infrastructure, logistics and investment in retail space are other big challenges faced by retailers.

### Coping up with strategies

Mattress brands must initiate necessary training programmes to apprise retailers of the latest trends in the mattress industry and help them tweak their sales processes by arming them with the right set of knowledge and resources. ISPF and other industry bodies have been conducting various training and professional enrichment programmes that would help retailers cope up with changing times. There are various ways that can be adopted by retailers to attract more consumers. Retailers must take cognizance of the new ways of engaging with consumers. Some of the methods that retailers can leverage to attract consumers include:

- **Consumer education and awareness:** Retailers must spend good amount of time and efforts towards engaging with the customers to educate them about the features and benefits of the mattress. If consumers are educated about the product, they are more likely to buy the mattress.
- **Personalization of shopping experience:** Majority of consumers prefer to touch and feel the product. That is the reason D2C businesses offer a 100-days trial policy so that customers can get the real feel of the mattress. If retailers want to pester consumers to buy mattresses from them, then they have to personalize their customer's shopping experience. For instance, providing personal space for prospective consumers to sleep on the mattress is more likely to convince customers about the quality and real feel of the mattress. In such circumstances, the consumers are more likely to buy the mattress.
- **Establishing online presence:** Investing in a robust online presence can help mattress retailers reach a wider customer base and tap into the growing trend of online shopping. This can include developing a user-friendly website, optimizing for mobile devices, and partnering with popular e-commerce platforms. Online marketing techniques such as search engine optimization (SEO), social media marketing, content marketing, and email marketing can help retailers reach and engage with the target audience effectively.
- **Value added services:** Additional services that differentiate the retailer from competitors, such as





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extended warranties, free delivery and installation, and hassle-free returns can help retailers build customer loyalty and increase trust in the brand.

- **Collaboration with interior designers and social media influencers:** Collaborating with interior designers will help retailers find consumers in hospitality and other commercial segment. Meanwhile, Social media influencers creating content in health and wellness segment could also help retailers find their target consumers.
- **Emphasis on consumer reviews:** Encouraging satisfied customers to leave positive reviews and testimonials on the retailer's website or social media platforms could help get potential buyers.
- **Referral programmes:** Implementing a referral program where satisfied customers are incentivized to refer friends and family to the retailer is another way to get more customers buying your mattress. This can help generate word-of-mouth referrals, which are often trusted by prospective buyers.

Mattress being a bulky product with more shelf life would still be considered for purchase through offline retail route by majority of the Indian consumers. Meanwhile, retailers must try ways to make retail buying a good experience for consumers. If customers get a good mattress with the guidance of retailers, they are more likely to come back to the same retailers. **CT**

### KEY TAKE-AWAYS

- With the pandemic acting as a catalyst, consumers are not shying away from experimenting the online route for making mattress purchases.
- New mattress brands that are directly reaching out to the consumers through the D2C route are posing a bigger challenge for retailers by making sales processes more convenient through a click on a web or mobile interface.
- There is a need for retailers to get enough understanding about their consumers requirements and they must train their staff as well, to follow the same protocols to sell enough products.
- Mattress being a bulky product with more shelf life would still be considered for purchase through offline retail route by majority of the Indian consumers.

# MATTRESS CIRCULAR JOURNEY

## A responsibility and not a choice

Mattress recycling is still at the stage of infancy in India but with the growing sales of mattresses across the country, it is important that consumers, manufacturers and recyclers adopt a non-negotiable attitude towards recycling.



[#phenkonahirecyclekaro](https://www.instagram.com/phenkonahirecyclekaro)

**A**t a time when the Indian mattress industry is battling against the dominant unorganized segment, key issues like sustainability, recycling, upcycling sounds like an agenda of future course of action. Apparently, mattress brands in India are embracing sustainability and consumers too are showing inclination towards buying eco-friendly and sustainable mattresses, however, implementation of efficient measures for mattress recycling is yet to be taken seriously.

In India, mattress recycling is still in the stage of infancy and is yet to become regular practice among Indian consumers, mattress manufacturers and recyclers. As of now, there are no clear legislation mandating safe mattress recycling practices in India. The Extended Producers' Responsibility (EPR) that has been implemented in many countries, including India, encourages manufacturers to take responsibility for the entire lifecycle of their products, from production to disposal, however, there are no clear rules with regard to mattress recycling. In the absence of clearly defined rules or legal framework, it becomes difficult to make safe recycling of mattresses a normal practice in India.


Mattress circular journey appears to be a feasible option that would benefit the environment in terms of, reduced wastage and lesser materials ending up at landfills. Hence, it is now quintessential for consumers, mattress manufacturers and recyclers to work cohesively towards ensuring an efficient and hygienic method for mattress recycling. When it comes to recycling, consumers should be equally liable towards ensuring the circular journey of mattresses. The stakeholders in mattress recycling journey should adopt a non-negotiable attitude towards mattress recycling. *"With recycling, you are preventing pollution and saving the earth. By removing older mattress, you are having an opportunity to use new mattresses,"* explains S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF).

Many Indian mattress makers have collaborated with Indian Sleep Product Federation (ISPF) to offer convenient solutions to consumers to dispose their old mattresses in the safest manner. ISPF has collaborated with 'The Kabadiwala team' through which they aim to help the end consumers recycle old mattresses sustainably without affecting the environment. The team at 'Kabadiwala' goes periodically and collects the old mattress and bring it to a stockyard. They procure all the raw materials from the old mattresses and repurpose it. The objective of the Kabadiwala initiative is '#phenkonahirecyclekaro' and it got phenomenal response from mattress users in Bhopal and Indore through a pilot project, wherein, people could handover their old mattresses to Kabadiwala.

When it comes to adopting a non-negotiable approach towards circular journey of the mattresses, consumers, manufacturers and recyclers should adhere to the right set of rules to ensure that mattresses are not dumped at the landfills. Consumers must prioritize buying

eco-friendly and sustainable mattresses and make it feasible for manufacturers to allocate the right recyclable resources towards manufacturing sustainable mattresses. Manufacturers should opt for natural and eco-friendly materials like organic cotton, natural latex derived from sustainable rubber tree plantations, coconut coir, and bamboo-derived fabrics in their mattress manufacturing process. Instead of using harmful chemicals for mattress production, low or zero VOC (Volatile Organic Compounds) materials should be used that will ensure the mattress is free from toxic substances. Once consumers use these mattresses for around five years, they can hand it over to recyclers who can recycle it effectively without causing harm to the environment.

Once consumers buy these responsibly manufactured mattresses, they can safely use it for some years and then exchange it with authorized retailers. All reputed brands have now collaborated with ISPF towards ensuring circular journey of mattresses. There are 'mega exchange programs' in which, brands are giving discounts to consumers who are ready to give back old mattresses. So, now when consumers buy a new mattress and exchange their old on, they are entitled to get a flat discount. Brands will now collect the old mattress, recycle it and use it.

There must be legal framework to make safe recycling of mattresses a normal practice in India. As the Indian mattress industry is recording better growth each year, having a strict regulations with regards to mattress recycling would not only ensure minimum wastage but also lead to effective utilization of resources through appropriate recycling and upcycling methods. Until there are well defined rules regarding mattress recycling, consumers, manufacturers and recyclers should work responsibly towards ensuring that the raw materials of discarded mattresses are utilized in a better way. 

### KEY TAKE-AWAYS

- Mattress brands in India are embracing sustainability and consumers too are showing inclination towards buying eco-friendly and sustainable mattresses, however, implementation of efficient measures for mattress recycling is yet to be taken seriously.
- ISPF has collaborated with 'Kabadiwala' through which they aim to help the end consumers recycle old mattresses sustainably without affecting the environment.

# WORLD OF SLEEP

## Time to elevate the conversation around Sleep

Mattress brands have transitioned from selling 'mattresses' to selling the 'idea of sleep'. However, many Indians do not prioritize the ambience around sleep. There is a need to increase discussion around the idea of good sleep and the importance of elements like bedroom temperature, lighting, ventilation and sleep accessories. Though the initiative has begun but mattress brands still have a lot to do in this area.



If we vaguely analyse the narrative set by various mattress brands in the recent past, one thing appears to be common. Every reputed sleep product brand has signed up with a popular Bollywood actor or a cricketer to discuss about the importance of sleep. Brands sign up with celebrities, if they seriously want to spread an important message to their target customers. Over the years, mattress brands are resorting to various media to talk about the importance of 'sleep'.

Meanwhile, at the ground level, brands and industry bodies like ISPF are initiating training programmes to train their retailers to educate their customers about the importance of sleep. It is only when consumers value the importance of sleep, it is more likely for mattresses to sell in larger volumes. It is high time that people realize the importance of sleep and for this reason, manufacturers and retailers should elevate the conversation around sleep.

World of Sleep is an initiative of HGH India and ISPF (Indian Sleep Products Federation) to showcase Indian and Global innovations in sleep product materials, designs and technology leading to improved quality and performance for their users. The World of Sleep serves as an educational platform for consumers, enabling them to learn about the importance of sleep, sleep disorders, and sleep-related products. This awareness creates a demand for high-quality mattresses and other sleep products, contributing to the growth of the Indian mattress industry.

Brands that earlier focussed on the features and benefits of sleep products and mattresses have now shifted their focus on discussing about the importance of good sleep. Indian mattress retailers are actively promoting the idea of sleep among consumers through various strategies. They are resorting to various measures to initiate more conversation around sleep. Mattress retailers are providing comprehensive information on their websites, blogs, and social media platforms about the importance of sleep, sleep hygiene, and the detrimental effects of sleep deprivation. Their aim is to educate consumers about the impact of a good mattress on sleep quality and overall health. Additionally, many retailers are running marketing campaigns that emphasizes the value of sleep for overall well-being. They use various media channels, including TV, radio, print, and online platforms, to spread awareness about the benefits of a good night's sleep and the role of a quality mattress in achieving it.

Retailers are also creating dedicated sleep zones within their showrooms, where customers can experience different types of mattresses and realize their features and benefits. Through a dedicated sleep zone within the showroom, retailers also place other sleep accessories like pillows, linens, comforters or blankets, duvets. The sleep zone could be made aesthetically better with a bedside lamp, right air conditioner temperature setting, wall papers and room fresheners. While experiencing the mattress, customers are also likely to buy sleep accessories, thereby, driving further

**Over the years, mattress brands are resorting to various media to talk about the importance of 'sleep'. It is only when consumers value the importance of sleep, it is more likely for mattresses to sell in larger volumes.**

sales for the retailers.

The trained sales staff can guide customers in selecting the right mattress based on their sleep requirements. Additionally, the sleep trial policies allow customers to try out their mattresses for a specified period before making a final decision. This encourages consumers to prioritize their sleep needs and choose a mattress that suits them best. Additionally, warranties and guarantees on mattresses assure customers of the product's quality.

Mattress retailers can also collaborate with healthcare professionals, such as orthopaedic doctors and sleep specialists, to provide expert advice to customers. These collaborations help build credibility and trust among consumers and emphasize the importance of choosing the right mattress for their specific health conditions and sleep requirements. *"Mattress retailers are tying up with orthopaedic doctors, paediatric doctors and discuss the features and benefits of orthopaedic mattresses, kids mattresses etc. After getting convinced about the mattress quality, doctors recommend these mattresses to their patients who should adhere to specific sleep requirements. In bigger hospitals, these mattresses are available for sale, making it easier for patients to buy the recommended mattresses from the hospital itself,"* explains S Sundaresan, Secretary, Indian Sleep Products Federation (ISPF). Effective positioning strategies will help mattress brands lure more customers. Being placed at the right place and right time, will help brands increase their reach.

Meanwhile, highlighting positive customer testimonials and reviews on their digital and social media platforms would create a sense of trust and reliability among potential customers, as they can read about the experiences of others who have benefited from investing in good quality mattresses.

Mattress retailers must change their mindset from being sales personnels to being 'consultants of sleep'. They must invest time and efforts towards understanding different types of mattresses, sleep products, their features and benefits and help customers choose the right mattress that would address their sleep requirements. Retailers must make customers understand the importance of sleep and help them find the right mattress that would address their sleep requirements. Besides that, retailers must strike a

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Brands that earlier focussed on the features and benefits of sleep products and mattresses have now shifted their focus on discussing about the importance of good sleep.

#### KEY TAKE-AWAYS

meaningful conversation regarding 'Sleep' and 'Comfort' with the prospective customers and convince them about the importance of investing in a good quality mattress and sleep accessories. Consumers have more purchasing power than before and the pandemic has pestered many people to take their health seriously. If consumers get convinced about the importance of sleep and the aids that could ensure good and sound sleep for them, they are more likely to invest in good mattresses and sleep accessories. Mattress brands are increasingly investing in sleep centers across India because by pushing the idea of 'sleep' and 'comfort', brands can further push sales of mattresses and sleep products. Hence, increasing conversation around sleep is becoming quintessential for mattress brands and retailers. 

- It is high time that people realize the importance of sleep and for this reason, manufacturers and retailers should elevate the conversation around sleep.
- Mattress retailers are providing comprehensive information on their websites, blogs, and social media platforms about the importance of sleep, sleep hygiene, and the detrimental effects of sleep deprivation.
- Retailers must make customers understand the importance of sleep and help them find the right mattress that would address their sleep requirements.



## One of our biggest sleep distractions is 24-hour internet access

There is no doubt that 24-hour internet access is a part of our daily lives, but it also affects our sleep cycle. Scrolling social media posts, checking emails, and watching infotainment videos at bedtime can lead to a disturbed sleep cycle. There are numerous ways in which 24-hour internet access can disturb our sleep cycle. The blue lights on the screen disturb the circadian rhythm. Checking mobile every time can cause anxiety related issues and attention deficit. Meanwhile, it is the one of the key contributors towards causing insomnia and can lead to obesity. When anyone uses mobile phones or their smart gadgets at bedtime, the brain starts releasing more cortisol hormone, which keeps the brain active and affects the melatonin that we

need for a sound sleep.

Some of the simple tips could help getting good and sound sleep. Avoiding usage of mobile or internet devices for at least 2 hours before bedtime could help the brain cells relax before sleep and ensure one gets sound sleep. Keeping your phone away from your bed or in another room could help you avoid getting distracted before sleep. Another better way could be to turn your cell phone into silent or airplane mode or one could even consider plugging off the Wi-Fi. Dimming the light of the room could help create a good ambience before sleep. Besides watching screen, listening to your favourite music or reading a book could help you get a sound sleep.



## We snore only during non-REM sleep

Good sleep is something we all need for a healthy mind and body. But many of us are troubled by the snoring of our partner or any family member. Snoring could disturb your sleep and could cause sleep apnea. Various research studies have established that snoring and sleep apnea are interlinked. Experts have divided sleeping cycles into five stages, and the snoring sound also depends on these stages. The first four stages are known as non-rapid eye movements (NREM) sleep. The last stage is REM sleep (rapid eye movements), also known as dreaming sleep. Snoring happens due to disturbances in the airflow and vibrations of throat tissues and it usually starts when a person enters the second stage of sleep. Snoring sounds slow down when we go to deep sleep, and airway tissues go properly relaxed.

There are many reasons linked to snoring, such as being overweight, drinking alcohol, having a blocked nose for a long time, taking medicines, being pregnant, smoking, etc. But one can treat snoring by making favorable lifestyle changes, including improving the sleeping position and doing some breathing exercises. If snoring does not improve on its own, consult a doctor for treatment.



## The natural sleep-wake cycle is regulated by stress hormone 'Cortisol'

Are you not getting enough sleep or having difficulty falling asleep? Well, this could be happening because of the stress hormone 'cortisol'. When the cortisol level is high in the body, it becomes difficult to sleep properly. At night, when we go to sleep, the cortisol level should be low in the body so that the body can get proper rest. High cortisol hampers the circadian rhythm and affects the melatonin hormone, which is essential for sound sleep. The cortisol hormones have their own rhythmic pattern, and the level of cortisol in the

body varies during the day. There is a natural sleep-wake cycle in the human body, but we disturb it due to a poor lifestyle and stress. Stress and cortisol are closely related to each other. When we are in a stressed condition, whether mentally or physically, the cortisol level also increases. And when we are in a relaxed state, the cortisol level also decreases. If your cortisol level is high, managing your stress, doing meditation, eating right and going out for walks or playing a game could help you get some good sleep.

## Kids experience more nightmares than adults

It is often observed that children wake up in the middle of the night and cry. At times, they do it out of physical discomfort or they could have experienced a nightmare. Kids, especially at the age of 3 to 6 years, or even 10 years, face more nightmares than adults. But why do kids experience nightmares and how can you, as a parent, help them? Fear or real-life stress in children triggers their subconscious mind to develop nightmares. A nightmare occurs during REM (rapid eye movement) sleep, and the child wakes up due to the increased heart rate. Nightmares are not a sign of mental illness. This is a sleep disorder that can happen to anyone. Sometimes there is no need to worry, but when this happens

regularly, it is better to a medical consultation.

So, when your kids experience nightmares, they need to be told that it's just a bad dream, not reality and put them to sleep quickly. There could also be a possibility of your child going through some trauma or stress. Parents must understand the reason and help them recover from it quickly. Meanwhile, giving them full care and attention could help them overcome the nightmare easily. Their screen time should be minimized before sleep so that they can get some good and sound sleep. It is advisable not to watch horror or thriller movies with children at night; this creates fear in their subconscious mind.



## Negative dreams are more common than the positive ones

Do you remember having a negative or scary dream last night and waking up in the middle of the night? People often have nightmares or scary dreams due to stressful lives and negative thoughts. We remember negative acts more than positive ones, which is why we also remember negative dreams more than positive ones. Some of the reasons why negative dreams occur more than positive dreams are due to factors like anxiety, depression, and stressful days, heavy meal at night,

medications, alcohol consumption, sleep disorders.

To improve the quality of your sleep and get rid of nightmares, one must adapt an active and healthy lifestyle, meditate, eat a light meal before bed, cut out on screen time before bed. You can easily improve the quality of your sleep by making a few positive changes throughout the day. Reduce your stress mentally and physically; it helps you prevent the problem of negative dreams.



## Your mind is more active while you are dreaming than when you're awake

Did you know that when you are dreaming, your brain is more active than when you are awake? Yes, this is true. When we are dreaming our brain works faster. Imagination goes to extreme levels. This is why we get supernatural powers in dreams. We dream at all stages of sleep, but most dreams come in the REM stage. We have multiple dreams in a single night. We remember the morning dreams more because this is the last one. The brain develops dreams as virtual reality by transforming thoughts and feelings into a film. During the dream, our whole brain is active at some level. During the REM stage, the prefrontal cortex is less active and is responsible for logic and planning. We sleep, but our mind and body do not sleep. It keeps working, and getting dreams is a sign that our cognitive function is active and takes us to an imaginary world.



## Understanding buying behavior of consumers through different channels

A dipstick survey conducted by Comfort Times revealed, majority of consumers prefer buying mattresses through retail outlets, preferably through MBOs, which gives them better offers and discounts. But what refrains consumers from buying mattresses online is the hassled delivery experience...

The organized segment in the Indian mattress industry has been giving tough competition to the unorganized segment. In the last five years, the unorganised sector has grown with the CAGR of around 9 percent in terms of value which is way slower than that of the organised sector, if we go by a Research and Markets report. One of the reasons for the aggressive growth rate of the organized segment is the increased emphasis on the omni-channel policy as an important marketing strategy.

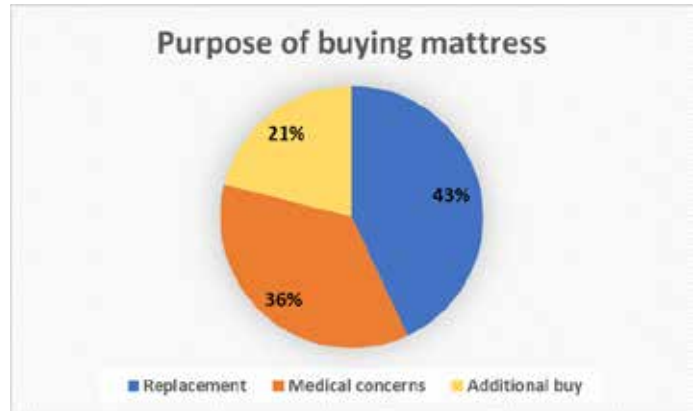
To give their omnichannel presence a strong push, digital native brands, namely the startups are raising funds to establish offline stores across the country and the established mattress brands are diverting resources towards increasing their online presence and launching their web stores to ensure seamless shopping experience for their customers.

The demand for mattresses is growing each year with rising income levels and growing health consciousness among people. Hence, it is imperative to understand the buying patterns and preferences of consumers. For this reason, Comfort Times had conducted a dipstick survey by reaching out to 40 consumers spread across various tier 1 and tier 2 cities in India, to explore the buying behaviour of consumers through different channels. Where do consumers buy a 'touch and feel' product like mattresses? Is it through retail outlets or through the online mode? If they buy it from retail outlets, do they prefer Exclusive Brand Outlets (EBOs) or Multi Brand Outlets (MBOs)? How was their buying experience? Are they currently happy with the mattress that they purchased? These are some questions to which we contemplate getting an answer.

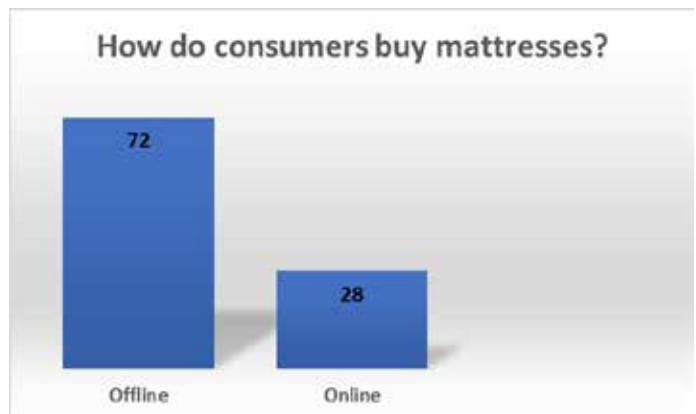
While conducting the survey, we realized that consumers concerns are varied and it is difficult to describe their problems in an objective manner. While we do have some definite answers to the questions mentioned above but in this story, we would comprehensively define the bigger concerns facing consumers, which affects their buying behaviour. One point may be noted that, all our respondents had bought mattresses in the last five years. Knowing consumers' problems should help mattress brands address consumers concerns and make buying processes easier.

### **Purpose of buying mattress**

A random question in the consumer survey was indeed an eye opener for us. When we reached out to consumers and started off with a general question regarding their purpose to buy a mattress, we were affirmed that consumers these days, understand the importance of a mattress. While 43 percent consumers bought a new mattress to replace their old one, 36 percent consumers bought new orthopaedic mattresses to address their medical concerns like back pain. Meanwhile, 21 percent consumers bought a new mattress as they needed an additional mattress for their home (refer image 1). Going by these numbers, one can decipher some positive trends in buying behavior, namely,



Source: Comfort Times Survey (Image 1)



Source: Comfort Times Survey (Image 2)

- Replacement of mattresses becoming a normal practice among Indian consumers;
- Growing demand for mattresses beneficial to health;
- Consumer willingness to invest in additional mattresses and sleep products.

### **Offline vs. Online: Where do consumers prefer buying mattresses?**

It is easy to guess that consumers would prefer buying a product like mattresses from any offline medium like exclusive retail outlets or multi brand outlets. But it seems, online shopping of mattresses is gradually catching up among Indian consumers. Through this latest survey, we figured out that 72 percent consumers still prefer buying mattress through retail outlets, while 28 percent consumers resorted to the online route to buy mattresses (refer Image 2). Comparatively, the number of online buyers were a handful among the total set of respondents but the number is not dismal.

This means that people are more willing to buy mattresses online. However, the big question remains, what was their experience while shopping online? Were they satisfied during the buying process? Consumer concerns cannot be deciphered in numbers as the problems faced by them during the online buying process was quite varied in

nature. For instance, 44-year-old Mallikarjun, who is based in Puttapparthi had purchased a mattress online, as he had limited access to different mattress brands. He did get his brand online and placed an order to be delivered at his residential address. However, he did not receive it on time as no delivery executive was ready to deliver the mattress at his small town. He was told that the nearest place for his mattress delivery would either be Anantapur or Bengaluru. After raising numerous complaints, he could get his mattress delivered to his address.

Meanwhile, 36-year-old Chikmagalur based Vishal Halbhavi had bought two mattresses and the first mattress purchase was done online. He did face problems with getting the mattress delivered to his residential address. He then bought another mattress from the nearest Multi Brand Outlet (MBO), which was delivered hassle free. Online deliveries are not only cumbersome for consumers based in small towns, even tier-1 cities consumers vouch on offline purchase of mattresses for the convenience offered through offline buy.

39-year-old, Hyderabad based Shibu Acharya was firm about buying her new mattress from an Exclusive Brand Outlet (EBO) to get better service from the dealer. According to Acharya, mattresses purchased online don't offer better after sales service. She was happy that her offline mattress purchase was hassle free, that too, during the pandemic and the delivery staff handled the product in a hygienic way.

### **EBOs vs MBOs vs Online**

Upon confirming about greater number of offline buyers for mattresses, we were further intrigued to know, the channel through which consumers prefer buying their favourite mattress. 43 percent consumers prefer buying mattresses from Multi Brand Outlets (MBOs), while 29 percent consumers prefer going to Exclusive Brand Outlets (EBOs) to buy their mattresses and the remainder preferred buying online.

While interacting with respondents, it could be inferred that

- Majority of consumers preferred buying mattresses from MBOs to avail some offers or discounts. They are not very particular about the brand.
- Brand loyal customers preferred buying mattresses from EBOs to get better after sales service and be assured of the product.

### **Buying experience**

71 percent consumers had a positive buying experience while shopping for mattresses. Meanwhile, 14 percent consumers reported going through a bad experience while buying their mattresses and the remainder 15 percent had a neutral buying experience (refer Image 4). It was observed that, consumer with positive buyer experience were largely offline buyers and the ones reporting negative buying experience

## **One of the reasons for the aggressive growth rate of the organized segment is the increased emphasis on the omni-channel policy as an important marketing strategy.**

were online buyers of mattresses. It gives us a clear impression that brands need to focus more on the execution of their delivery processes for mattresses that are ordered online. Negative buying experience will refrain consumers to trust the brand. This will also give them a scope to switch to their competitors.

### **Product experience- How is the mattress doing?**

Though quite some respondents faced issues while buying the mattresses, but most of them were happy with the mattresses, they had purchased. 86 percent consumers are currently happy with the mattress that they had bought and only 14 percent are looking towards replacing their mattress owing to medical purposes or comfort reasons (refer image 5). The good part is most of the consumers are experiencing the product without complaints.

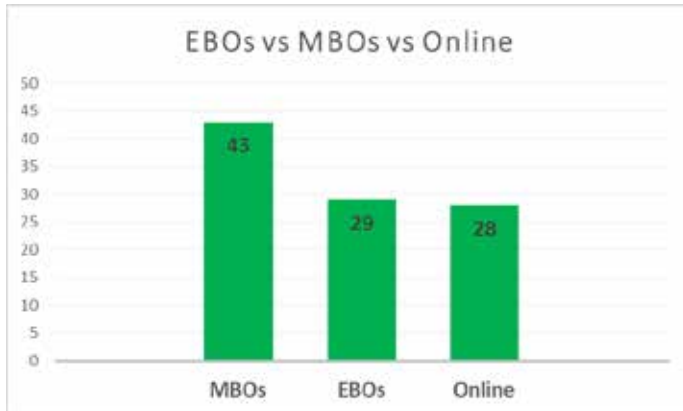
### **Conclusion**

The dipstick survey that intended to understand the buying behaviour of consumers through different channels, gave us some firm results on the buying preferences of Indian consumers. Majority of consumers still prefer buying mattresses offline. Despite many D2C brands operating in the domestic mattress market with user friendly policies, brands are failing to lure consumers to buy mattresses online.

Consumers are more willing to buy mattresses online these days but the problem lies with the execution of mattress delivery processes. Untimely delivery of mattresses or hassled delivery experiences will not only pester consumers to switch to other brands but will also refrain them from buying mattresses online.

If mattress companies cannot assure seamless shopping experience through online medium, then more number of buyers will switch to 'brick and mortar' stores to buy mattresses, which means brands will have to invest more on store space and other resources. Whereas, ensuring smooth online shopping experience will help companies to cut down on their costs.

Majority of consumers prefer buying mattresses from MBOs meaning that there are still many consumers who are not brand specific and are often lured by offers and discounts. Additionally, we also figured out, most of the consumers are not even aware of the type of the mattress that they had bought. They could just recollect the brand name. This calls for brands to invest more resources towards



Source: Comfort Times Survey (Image 3)



Source: Comfort Times Survey (Image 4)



Source: Comfort Times Survey (Image 5)

the training and development of their sales personnels, who can in turn, guide their customers to make more informed buying decisions.

Majority of consumers are happy with their mattress purchase, giving an impression that mattress manufacturers have come a long way to address consumer requirements, in terms of, comfort and functionality. However, mattress brands must ensure that they create seamless shopping experience for their consumers across all medium. Ensuring hassle free delivery experience for customers ordering mattresses online is quintessential for mattress brands. Good shopping experience will ensuring consumers coming back to a brand for further purchases. **CT**

It is imperative to understand the buying patterns and preferences of consumers.

### KEY TAKE-AWAYS

- To give their omnichannel presence a strong push, digital native brands, namely the startups are raising funds to establish offline stores across the country and the established mattress brands are diverting resources towards increasing their online presence and launching their web stores to ensure seamless shopping experience for their customers.

Source: Comfort Times Survey (Image 1)

- While **43 percent** consumers bought a new mattress to replace their old one, **36 percent** consumers bought new orthopaedic mattresses to address their medical concerns like back pain. Meanwhile, **21 percent** consumers bought a new mattress as they needed an additional mattress for their home.

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Source: Comfort Times Survey (Image 4)

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Source: Comfort Times Survey (Image 5)

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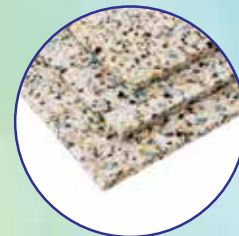
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